MSIX
User Manual

MSIX User Manual

Version 6.0

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"MSIX IS ONLY AVAILABLE TO AUTHORIZED USERS"

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Section 1: Overview

Welcome to the Migrant Student Information Exchange (MSIX)! MSIX is an online system containing migrant student records from all participating states to facilitate the national exchange of migrant students' educational information among the states. MSIX is available to State Migrant Education Program (MEP) staff along with other users from the MEP Community. It does not replace existing migrant student information systems; however, it does work with existing systems to keep student records current. MSIX does the following:

- Produces a single "consolidated record" for each migrant child that contains information from each state in which the child was ever enrolled
- Contains the minimum data elements necessary for the proper enrollment, grade and course placement, and accrual of credits for migrant children

Section 1 will introduce you to the basics of MSIX to give you the foundation to understand its features and functions. This section includes the following topics:

- Introduction
- MSIX Purpose
- MSIX Requirements
- User Roles and Responsibilities
- Navigational Elements

Introduction

The timely transfer of education records for migrant children between schools has been a longstanding challenge. Migrant children often enroll in multiple schools for varying amounts of time each year as their families migrate in search of temporary or seasonal work in agriculture or fishing. MEP staffs continue to find it difficult to share and consolidate student information that schools, local educational agencies, and states collect on migrant children in a timely and meaningful way that helps school personnel make appropriate decisions when the students arrive. These conditions and those shown below prompted the need for an exchange of records.

- **High Movement** — Highly mobile migrant student population
- **Short Notice** — Students move from state-to-state often without notice
- **Lack of Data** — Timely and accurate educational information not always available

- **Placement Errors** — Students placed in incorrect courses or grades
- **Loss of MEP Services** — Students not provided the most beneficial MEP services

In response to this challenge and a Congressional mandate to link the existing migrant student information systems, the U.S. Department of Education (ED) implemented the Migrant Student Record Exchange Initiative. The goals of this initiative will:

- **Goal 1**: Create an **electronic exchange** for the transfer of migrant student education data among the States
- **Goal 2**: Promote the **use** of the MSIX application
- **Goal 3**: Ensure the use of the consolidated migrant student record for the purposes of **enrollment, placement, and accrual of credits** of migrant students
- **Goal 4**: Produce **national data** on the migrant population

At the heart of this initiative is the MSIX. The MSIX does not replace existing state migrant student record systems. Rather, it links them in a minimally invasive manner to collect, consolidate, and make critical education data available. The MSIX also leverages available information provided by the states to ED's Education Data Exchange Network (EDEN) system to ease the data collection burden on states.

MSIX offers many benefits to promote its usability. Some of those key features include the following:

- **Information** — Retrieve and view student information
    - Search, view, and print consolidated student records
    - Multiple search parameters
    - Accessible online
    - Printed reports available
- **Record Conflicts** — Identify and resolve student record conflicts
    - Student Merge workflow
    - Student Split workflow
- **Notification** — Alert other jurisdictions of planned student moves
- **Role-based** — Create users based on 'MSIX roles' to allow appropriate access to MSIX functions and student data
- **Structure** — Create regions within a state to manage MSIX activities and workflow

MSIX Purpose

The primary purpose of MSIX is to make migrant student information available to authorized school personnel to support them in making decisions on student enrollment, grade or course placement, and accrual of credits. A secondary purpose of MSIX is aggregation of information to analyze national trends.

MSIX Requirements

MSIX requires specific browser configuration. Your Internet browser should be set up so that it *does not* cache Internet pages. This will allow any MSIX updates and patches to be viewed on your computer. MSIX supports the use of four browsers: Internet Explorer v5.5 or higher, Firefox v1.5 or higher, Netscape v7.0 or higher, or Safari v2.0 or higher. The steps to configure each browser are shown below.

<u>**Steps to Configure Your Internet Explorer Browser**</u>

1. From the "Menu Bar," select **Tools**, and select **Internet Options**.
2. From the "Internet Options" window "General" tab in the "Temporary Internet Files" section, click the **Settings** button.
3. On the "Settings" window "Check for newer version of the stored pages" section, select the option for **Every time you start Internet Explorer.** Then, click the **OK** button.

Figure 1.1: Configuring the Internet Explorer Browser

Steps to Configure Your Firefox Browser

1. From the "Tools" option, select **Options**.
2. On the "Options" window, select the **Privacy** tab. In the "Private Data" section, select the option for **Always clear my private data when I close Firefox.**
3. In the "Private Data" section, click the **Setting** button.
4. On the "Clear Private Data" pop-up, select the option for **Cache**. Then, click the **OK** button.
5. On the "Options" window; click the **OK** button.
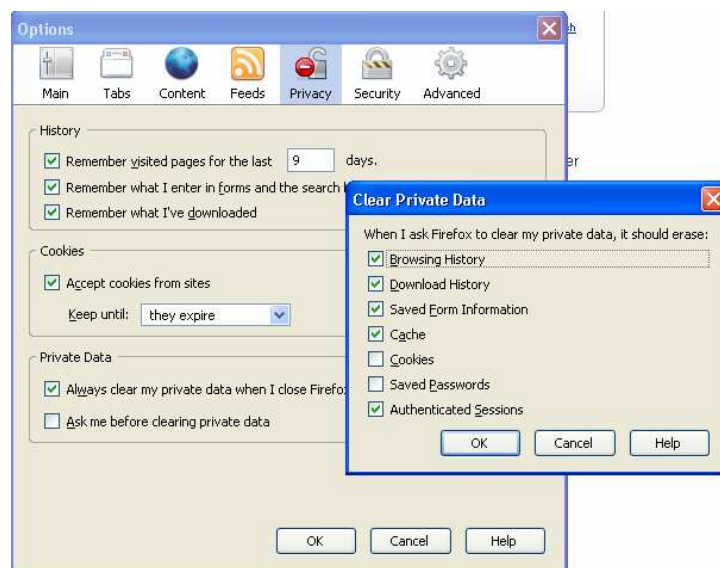
Figure 1.2: Configuring the Firefox Browser

Steps to Configure Your Safari Browser

1. From the "Edit" option, select **Private Browsing**.
2. On confirmation window, click the **OK** button.

Figure 1.3: Configuring the Safari Browser

<u>Steps to Configure Your Netscape Browser</u>
1. From the "Tools" option, select **Options**.

2. On the "Options" window, select the **Privacy** tab.

3. In the "Private Data" section, deselect the option for **Ask me before clearing private data**, and select the option for **Always clear my private data when I close Navigator.**

4. In the "Private Data" section, click the **Setting** button.

5. On the "Clear Private Data" pop-up, select the option for **Cache**. Then, click the **OK** button.

6. On the "Options" window, click the **OK** button.
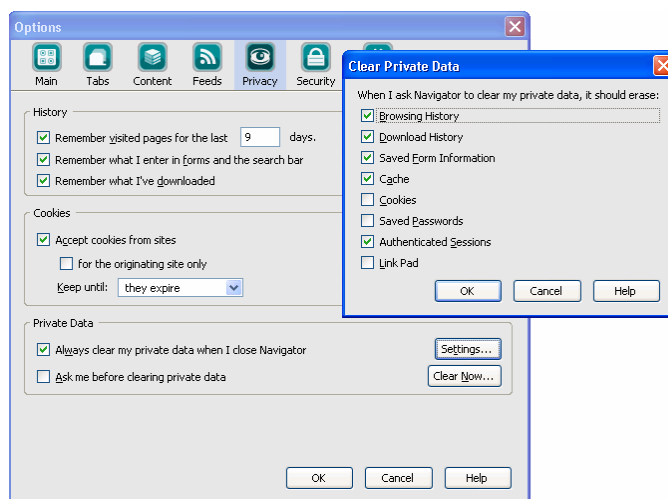
Figure 1.4: Configuring the Netscape Browser

MSIX also has specific requirements for downloads of the training content. Adobe Flash Player (version 6 or later) must be installed in order to view the online training modules. Adobe Flash Player is often part of the standard software provided with most computers. The flash player can be downloaded, <u>free of charge</u>, from www.adobe.com.

Users without access to Adobe Flash Player should reference the *MSIX User Manual* for guidance and information about using MSIX. This manual can be accessed from the training link in the Top Navigation menu as well as from the MSIX website in the Trainers' Corner, which is outside the application.

User Roles and Responsibilities

MSIX is used by personnel at the district, region, state, and national levels. MSIX is used mainly by the front-line educators that need migrant student data to make time-sensitive and appropriate decisions on enrollment, grade or course placement, and accrual of credits. These users are typically the local school registrars and counselors, or Migrant Education Program (MEP) specialists.

State MEP users also require access to MSIX; some of these users directly interface with migrant students and others provide administrative and technical support to the MEP. U.S. Department of Education (ED) personnel are also MSIX users; however, ED requires MSIX for national trend and statistical analysis purposes only.

The table below identifies the specific user roles and responsibilities for MSIX. It includes a description of the user's MSIX job responsibilities, role functions available within the system, and the potential kinds of individuals who may perform in each role. A second table follows that provides essentially the same information but in a snapshot, abbreviated form.

MSIX User Roles and Responsibilities			
User Role	**Description**	**Functions Allowed**	**Potential Users**
School and District Level Roles			
MSIX Primary	MSIX Primary Users can query student records in all states. This user can also initiate the merge and split process for student records in his or her state.	• Search, display, and print student records for students in all states • Initiate merge and split of student records • Email notification of an arrival or departure of a student • Export Student Records to File	• Guidance Counselors • MEP Data Entry Staff • Recruiters • Registrars • Teachers
MSIX Secondary	MSIX Secondary Users can query student records in all states.	• Search, display, and print student records for students in all states • Email notification of an arrival or departure of a student	• Guidance Counselors • MEP Data Entry Staff • Recruiters • Registrars • Teachers

MSIX User Roles and Responsibilities

User Role	Description	Functions Allowed	Potential Users
District Data Administrator	District Data Administrators can validate or reject near matches, merges and splits of student records. This user can also initiate the merge and split process for student records in his or her district.	• Search, display, and print student records for students in all states • Generate Reports • Initiate merge and split of student records • Validate or reject record near matches, merges and splits • Resolve data quality issues • Respond to escalation requests • Email notification of an arrival or departure of a student • Export Student Records to File	• State MEP Administrators • MEP Data Entry Staff
Regional Level Roles			
Regional Data Administrator	Regional Data Administrators can validate or reject near matches, merges and splits of student records. This user can initiate the merge and split process for student records in his or her region. This user will also serve as the secondary point of contact for escalation issues.	• Search, display, and print student records for students in all states • Generate Reports • Initiate merge and split of student records • Validate or reject record near matches, merges and splits • Resolve data quality issues • Respond to escalation requests • Email notification of an arrival or departure of a student • Export Student Records to File	• State MEP Administrators • MEP Data Entry Staff
Regional User Administrator	Regional User Administrators establish and manage user accounts for users in their region.	• Create User accounts • Assign User Role(s) • Update User account information • Deactivate User accounts • Reset passwords	• State-identified
State Level Roles			
State Data Administrator	State Data Administrators can validate or reject near matches, merges and splits of student records. This user can initiate the merge and split process for student records in their state. He or she can also resolve data quality issues and serve as the primary point of contact for escalation issues.	• Search, display, and print student records for students in all states • Generate Reports • Initiate merge and split of student records • Validate or reject record near matches, merges and splits • Resolve data quality issues • Respond to escalation requests • Email notification of an arrival or departure of a student • Export Student Records to File	• State MEP Administrators • MEP Data entry staff
State User Administrator	State User Administrators establish and manage user accounts for users in their state.	• Create User accounts • Assign User Role(s) • Update User account information • Deactivate User accounts • Reset passwords	• State-identified
State Region Administrator	State Region Administrator establishes and maintains the regional structure and associated districts for states that choose to use regions.	• Enable and disable regional structure • Create new regions • Associate districts to regions • Edit regions	• State MEP Administrators • MEP Data entry staff

MSIX User Roles and Responsibilities			
User Role	**Description**	**Functions Allowed**	**Potential Users**
U.S. Department of Education (ED) User Roles			
Government Administrator	Government Administrators can generate summary level standard and ad hoc queries on a State, Regional, or National level.	• Generate Reports	• OME
OME User Administrator	OME User Administrators establish and manage user accounts for all State User Administrators.	• Create user accounts • Assign State User Administrator role • Update user account information • Deactivate user accounts • Reset passwords	• OME
Privacy Act Administrator	Privacy Act Administrators can enter statements provided by students and parents that formally dispute the data contained in a student's MSIX record. They can also query and view student records from all states.	• Search, display, and print student records • Enter dispute statements into a student's MSIX record	• OME

Table 1.1: MSIX User Roles and Responsibilities

Function	Primary User	Secondary User	District Data Admin	Regional Data Admin	State Data Admin	State Region Admin	Regional User Admin	State User Admin
My Account	X	X	X	X	X	X	X	X
Search, Display & Print Student Records in all States	X	X	X	X	X			
Export Student Records to File	X		X	X	X			
Generate Reports			X	X	X			
Send Student Move Notices	X	X	X	X	X			
Initiate Student Merges and Splits	X		X	X	X			
Validate / Reject Student Merges and Splits			X	X	X			
Access District Worklist Items			X					
Access Region Worklist Items				X				
Access State Worklist Items					X			
Create / Modify State User Level Accounts								X
Create / Modify Regional Level User Accounts							X	X
Create / Modify School or District Level User Accounts							X	X
Reset Passwords							X	X
Enable Regional Functionality						X		
Create / Modify Regions						X		

Table 1.2: MSIX User Roles and Responsibilities – A Snapshot View

Navigational Elements
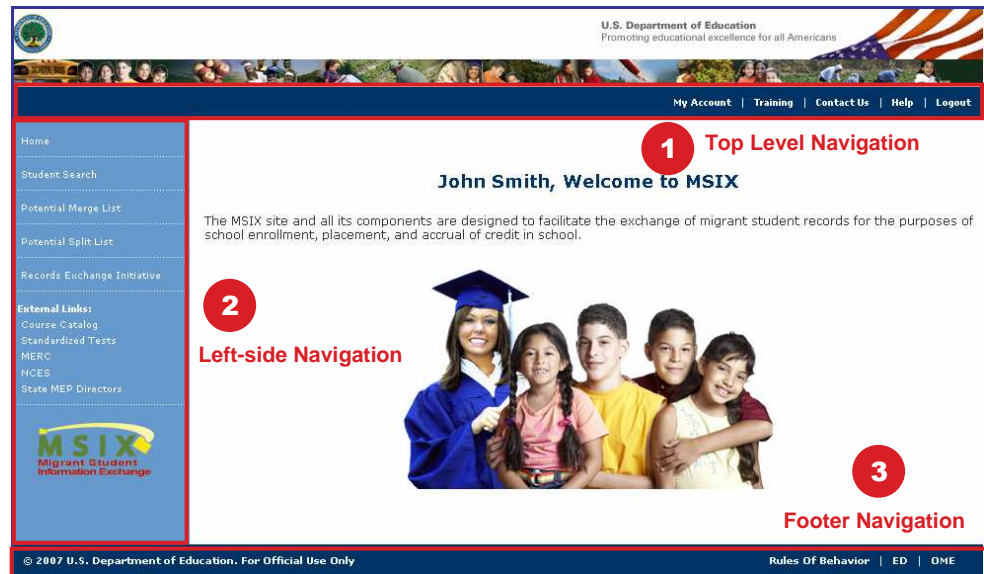
The MSIX navigational elements are the options on each page that allow you to choose where you wish to go within the MSIX application. The common navigational elements across MSIX are comprised of: 1) Top Navigation, 2) Left-side Navigation, and 3) Footer Navigation. The sample above is shown from the Primary User's Home page and displays the available functions for that role in the Left-side Navigation.

Top Level Navigational Elements

My Account
The My Account link navigates you to your MSIX account information. You can update your phone number or reset your password on this page. When you reset your password, MSIX will email you a new temporary password that you will change the next time you access MSIX.

Training

The Training link navigates you to the MSIX Training page, which contains online training for user roles, the MSIX User Manual, and the MSIX Quick Reference Guide, a job aide for MSIX functions used most frequently.

Contact Us

The Contact Us link navigates you to the Contact Us page, which contains contact information for the MSIX Help Desk along with other useful information. You can reach MSIX support via email (msixsupport@deloitte.com) or the MSIX Help Desk (**1.866.878.9525**). *Note*, the Help Desk <u>does not</u> reset passwords, create new users, deactivate, or disable existing users.

Help

The Help link navigates you to the searchable MSIX online help and Frequently Asked Questions (FAQs).

Logout

The Logout link you outside MSIX to end your MSIX session.

Left-side Navigational Elements

The links in the Left-side Navigation Menu will vary from user to user based upon their role. For instance, only State and Regional User Administrators will see the User Administration link on the Left-side Navigation Menu. The sample shown below includes every link and is not found in any one user role.
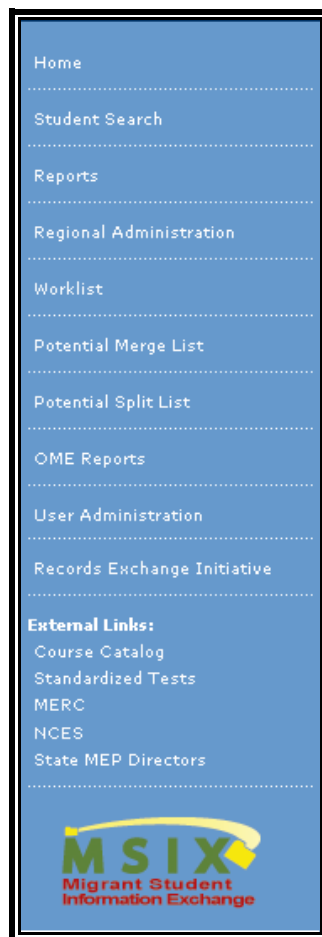
Home

The Home link navigates you to the MSIX home page.

Student Search

Student Search is a role-based link that navigates you to the MSIX "Basic Student Search" page. The search page allows you to query for student information. This link is available for Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

Reports

Reports is a role-based link that navigates you to the reports section of MSIX and will list reports assigned to your role. For example, State Data Administrators, Regional Data Administrators, and District Data Administrators will find "State Data Reports" and "Worklist Reports." User Administrators will find "User Management Reports." Finally, certain ED user roles will find the "Federal Data Reports."

Regional Administration

Regional Administration is a role-based link that navigates State Region Administrators to the "Regional Structure Administration" page. This page allows those users to create, update, add or disable a regional structure and associated districts for states that choose to use the regional structure.

Worklist

Worklist is a role-based link that allows users to take action on near matches, merges, and splits. This link is available for State Data Administrators, Regional Data Administrators, and District Data Administrators.

Potential Merge List

Potential Merge List is a role-based link that navigates you to the list of students you have identified for a potential merge. The merge process is initiated for these students in this section of MSIX. This link is available for Primary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

Potential Split List

Potential Split List is a role-based link that navigates you to the list of student records you have identified for a potential split. The split process is initiated for these students in this section of MSIX. This link is available for Primary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

OME Reports

OME (Office of Migrant Education) Reports is a role-based link that navigates certain ED user roles where they will find Federal Data Reports, OME (standard) Reports, and Ad Hoc OME Reports.

User Administration

User Administration is a role-based link that navigates you to the User Administration section. This section allows you add, update, disable, or deactivate MSIX users. This link is available for State User Administrators, Regional User Administrators, and OME User Administrators.

Regional Administration

The Regional Administration link is a role-based link that navigates you to the "Regional Structure Administration" page. This section allows you to create, update, add, or disable a regional structure and associated districts for states that choose to use the regional structure. This link is only available to State Region Administrators.

Records Exchange Initiative

The Records Exchange Initiative link takes you to the OME Records Exchange website.

External Links

The External Links section of the Left-side Navigation links you to additional websites that are available outside of the MSIX application. The external links are as follows:

- **Course Catalogs** — The Course Catalog provides links to state course catalogs.
- **Standardized Test** — The Standardized Test provides links to state standardized test lists.
- **Migrant Education Resource Center (MERC)** — The MERC link navigates you to the MERC website. The MERC website provides migrant education personnel access to a common point of focus for all documents and training related to the administration and execution of Migrant Education Program requirements. The MERC website provides a mechanism for problem-solving and professional development.
- **National Center for Education Statistics (NCES)** — The NCES is located within the ED and the Institute of Education Sciences. It is the primary federal entity for collecting and analyzing data related to education. MSIX uses the standard NCES codes that are available on the NCES website. For more information about NCES, click the "NCES" link or go to (http://nces.ed.gov).
- **State Migrant Education Program (MEP) Directors** — The State MEP Directors link provides a list of the State MEP Directors along with their contact information.

Footer Navigational Elements

Rules of Behavior

This link provides the Rules of Behavior (ROB) that all users must accept before accessing MSIX. The ROB describes your responsibilities and expected behavior with regard to information and information system usage. They include the following sections: Responsibilities, Monitoring, MSIX Security Controls, User Credentials, Protection of MSIX Information, and Other Security Considerations.

ED

The ED link navigates you to the U.S. Department of Education (ED) website. The URL is http://www.ed.gov.

OME

The OME link navigates you to the Office of Migrant Education website. The URL is http://www.ed.gov/about/offices/list/oese/ome/index.html.

Section 2: Getting Started

Now that you understand the basics of Migrant Student Information Exchange (MSIX), you need to learn how to get begin and what steps are needed to gain access and become an MSIX user. However, even before you become a user, you can become familiar with some of the tools and resources available for MSIX. Once you receive your User Name and Password, you will want to know how to log in, log out, and how to manage your user account. This section includes the following topics:

- Gaining Access to MSIX
- Preparing to be an MSIX User
- Logging In
- Logging Out
- Managing My Account

Gaining Access to MSIX

Information is found on the MSIX website (https://msix.ed.gov) to enable you to apply for access to MSIX under the "How do I get an account?" link. Here, you will find the *MSIX User Access Guide and Application*, which includes a sample application form and describes the MSIX Application Procedure. This procedure is composed of three processes: Applicant, Verifying Authority, and Final Approving Authority and assumes that Training occurs at anytime within.

Training	Applicant	Verifying Authority	Final Approving Authority
• Obtain training from Trainers' Corner on MSIX website "Sign In" page • Complete MSIX training • Submit training certification	• Obtain an *"User Application for Access to MSIX"* form on MSIX website • Complete application • Submit application to Verifying Authority with appropriate identification	• Review entire application for completeness • Verify Applicant's job title and attest to the requested MSIX role • Complete "Verifying Authority" portion of the application • Return application to Applicant	• Applicant sends to State User Administrator who reviews "Applicant" and "Verifying Authority" sections for completeness • Create account based on application information • Retain application for official records

Figure 2.1: MSIX Application Procedure

These processes are discussed in further detail in this guide to provide the steps for obtaining access to MSIX. In addition, the "User Administrator Search" function is found so that you can determine where to submit your application.

Preparing to be an MSIX User

You can begin to learn about MSIX even before you receive your MSIX User Name and temporary Password. In fact, it is ***strongly recommended*** that you review the resources that are available on the website.

Sign In Page Links

The "Sign In" page contains some basic links to help you become familiar with MSIX. They include the following: Forgot Password, Contact Us, How Do I Get an Account?, Trainers' Corner, MSIX Implementation Status, and Help.

Forgot Password

Forgot Password navigates you to a page that contains the contact information for a User Administrator who can reset your password if you forget it or are locked out.

Forgot Password | Contact Us | How Do I Get an Account? | Trainers' Corner | MSIX Implementation Status | Help

Contact Us

Contact Us navigates you to the "Contact Us" page, which contains contact information for the MSIX Help Desk. You can reach MSIX support via email (msixsupport@deloitte.com) or phone (1.866.878.9525). ***Note***, the Help Desk does not reset passwords, create new users, deactivate, or disable existing users.

Forgot Password | Contact Us | How Do I Get an Account? | Trainers' Corner | MSIX Implementation Status | Help

How Do I Get an Account?

How Do I Get an Account provides access to the MSIX User Access Guide and Application.

Forgot Password | Contact Us | How Do I Get an Account? | Trainers' Corner | MSIX Implementation Status | Help

Trainers' Corner

MSIX has a robust training program that includes online help and web-based training. The training is accessible directly from the MSIX website under Trainers' Corner. Therefore, it is available prior to logging into MSIX by clicking on the "Online Training" link for the desired role. This link contains numerous documents to acquaint you with MSIX and online training modules for every MSIX user role as shown below:

Forgot Password | Contact Us | How Do I Get an Account? | Trainers' Corner | MSIX Implementation Status | Help

1. **Online Training** — Six role-based MSIX training courses that each take on the average of one to two hours to complete depending upon your role and how quickly you move through the course
2. **MSIX User Manual** (MS [Microsoft] Word, Adobe PDF [Portable Document Format], 508 Compliant) — Detailed resource for using MSIX
3. **Quick Reference Guide** (MS Word, Adobe PDF) — One-page job aide to summarize the steps for the most commonly used MSIX tasks
4. **Frequently Asked Questions** (FAQ) (MS Word, 508 Compliant) — Most typically asked questions in a searchable tool
5. **MSIX Training Environment Guide** (MS Word, Adobe PDF) — Resource to enable state training facilitators plan, deliver, and evaluate their MSIX training
6. **MSIX User Administrator Guide for Managing User Accounts** (MS Word, Adobe PDF) — Role-specific manual to support User Administrator tasks
7. **User Access Guide and Application** (MS Word, Adobe PDF) — Manual to guide users in requesting and acquiring a user account
8. **User Application for Access to MSIX** (MS Word, Adobe PDF) — Sample form that states can use to register users, verify their identification, and confirm the correct level of the user's access
9. **MSIX Brochure** (Adobe PDF in English and Spanish) — Concise information to describe MSIX presented in a question-style format
10. **MSIX Train-the-Trainer Regional User Conference** — A presentation that provides a basic overview of MSIX that was used at various conferences to introduce MSIX
11. **MSIX Help Desk** — Phone number and email address for the Help Desk
12. **MSIX Release Change Notes** (MS Word, Adobe PDF) — Descriptions of the enhancements made to MSIX since it's initial roll-out in September 2007

MSIX Implementation Status
MSIX Implementation Status displays a summary of the pre-implementation, implementation and fully implemented completion dates for each state. You will see a United States map with a key to define the colors just below the map.

Forgot Password | Contact Us | How Do I Get an Account? | Trainers' Corner | MSIX Implementation Status | Help

Help
Help provides access to a comprehensive searchable, online help and FAQs.

Forgot Password | Contact Us | How Do I Get an Account? | Trainers' Corner | MSIX Implementation Status | Help

Logging In

You will be notified via two separate emails as soon as you have been added as a user to MSIX. Samples of the emails are shown below.

```
From Msix.Application@eds-orlando.com <Msix.Application@eds-orlando.com>
Date: Apr 1, 2007  10:38 AM
Subject: MSIX Account Confirmation
To: <User Name>

Hello <User Name>,

Your State's MSIX User Administrator has just created an MSIX account for
you with the following user name:

<User Name>
(Permanent-Your User Name will not change.)

MSIX will send you another email with your temporary password

Please use the following link to access MSIX: https://msix.ed.gov.

If you have forgotten your login or password, please contact your
appropriate User Administrator.

If you have any questions regarding the contents of this email, please
refer to the online help, user guide and other documentation available
within MSIX.  You may also contact the MSIX Support Team at
msixsupport@deloitte.com

This email account is not monitored.
```

Figure 2.2: User Name Sample Email

```
From Msix.Application@eds-orlando.com <Msix.Application@eds-orlando.com>
Date: Apr 1, 2007  10:38 AM
Subject: MSIX Account Confirmation
To: <User Name>

Hello <User Name>,

Please use the following password when accessing MSIX for your
initial login:

<System-generated Password>
(Temporary-You will change your Password.)

Please use the following link to access MSIX: https://msix.ed.gov.

If you have forgotten your login or password, please contact your
appropriate User Administrator.

If you have any questions regarding the contents of this email,
please refer to the online help, user guide and other documentation
available within MSIX.  You may also contact the MSIX Support Team
at msixsupport@deloitte.com.

This email account is not monitored.
```

Figure 2.3: Password Sample Email

Once you have received these emails, you are ready to log into MSIX for the first time. When you do so, you are prompted to review the MSIX training materials, the Rules of Behavior (ROB), and change your password. After your initial MSIX login, you <u>will not</u> be asked to accept the ROB again. However, you will be required to <u>change your password every 60 days</u>.

In the event that you are not a regular MSIX user and it has been 90 days since you last used MSIX, your account will be automatically disabled. You must contact a User Administrator to have the account reactivated. You can find your User Administrator's contact information by clicking on the "How Do I Get an Account" link on the MSIX Sign In Page.

Login Error Messages

You must carefully enter your User Name and Password. MSIX displays an error message after each unsuccessful login attempt. You will be given two invalid login attempts. After the ***third unsuccessful login***, your account locks and an error message is displayed.

Login Error Messages	
Scenario	**Error Message**
User Name Field is Blank	**Error:** You must enter a valid user name.
Password Field is Blank	**Error:** You must enter your logon password.
User Name or Password are Incorrect	**Error:** Authentication failed. Please try again.
Three Invalid Login Attempts Have Been Made	**Error:** Your account is locked. Please notify the system administrator.

Table 2.1: Login Error Messages

If your account is locked, contact your User Administrator to request that your password is reset. To locate your User Administrator, go to the MSIX website (http://msix.ed.gov) and click the "Contact Us" link. On this page, you will find the "User Administrator Search" link.

Steps for First Time Login

1 Access the MSIX **URL** (http://msix.ed.gov) and enter your **User Name** and **Password.** Then, click the **Login** button.

2 On the "Change Password" page, enter your **Old Password.** Then, enter a new password <u>first</u> in the **New Password** field and then a <u>second</u> time in the **Confirm New Password** field. Your new password must conform to MSIX password standards. To complete this step, click the **OK** button.

3 On the "Sign In" page, enter the newly created password in the **Password** field. Then, click the **Login** button.

4 Click the **Continue** button on the "Warning" page.

5 **Review and use** the MSIX training materials. Then, click the **Next** button. This page will only show with your first login to MSIX to remind you of the importance of getting MSIX training prior to using MSIX.

6 On the "Rules of Behavior" page, review the information. Then, click the **Accept** button.

Log into MSIX
The Sign In page is the entrance into MSIX.

Change Your Password Using the MSIX Password Standards
The "Change Password" page allows you to change your password and only appears with your first time login. MSIX standards require that a password must have the following criteria:

- At least eight (8) characters
- At least one upper case letter (A-Z) and one lower case letter (a-z)
- At least one number (1-9)
- At least one special character (e.g., #, % or &)
- Cannot have spaces
- Cannot match any of your previous six (6) passwords

Sign In Again with Your New Password

The "Sign In" page reappears with an error message prompting you to enter your password. This is the new password that you *just created* on the "Change Password" page.

Review the Warning Page

The MSIX Warning page displays every time you successfully login. You must press the continue button to accept the warning before proceeding to the next page.
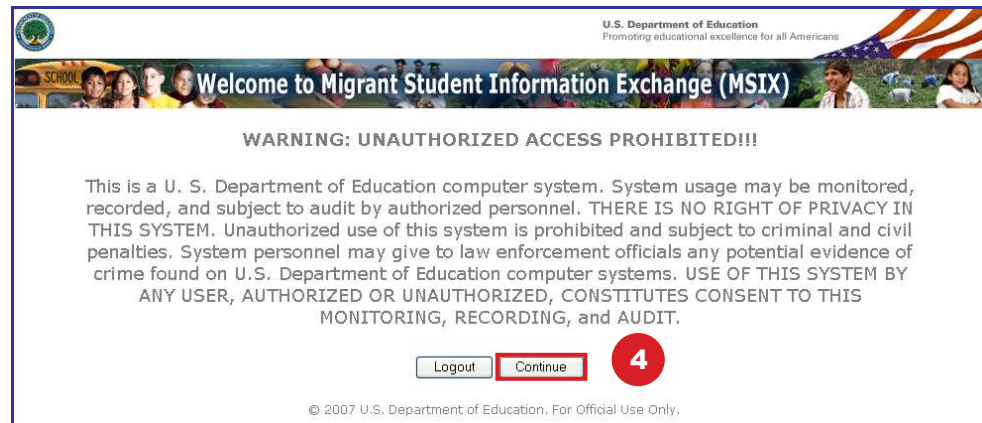
Review the Training Materials

This page displays upon initial user login. The Training Materials must be reviewed by each user before proceeding to the ROB. You can review the Training Materials at any time by clicking on the Training link at the top of any MSIX page inside the application or by finding them outside the application on the MSIX website.

Review the Rules of Behavior (ROB)

This page displays upon initial user login. The ROB <u>must be accepted by each user</u> and a record of the user's acceptance stored in the database. You can view and print the ROB at any time by clicking on the link in the Footer Navigational elements at the bottom of any MSIX page.

Logging Out

Logout terminates your MSIX session. This helps to manage the system resources so connections are not open while not being used. It also provides an extra layer of security to help prevent others from using your MSIX user account.

Steps to Log Out of MSIX

1 Click the **Logout** link in the Top Navigation.

Log Back Into MSIX or Close Your Browser
The "Logout" page provides the ability to return to the "Sign In" page using the Return button. If you are finished using MSIX, just close your browser window.

Managing My Account

You have the ability to update your account information. Updating account information is limited to changing your telephone number and resetting your password. You can change your telephone number as often as it is needed. However, you can only change your password once per day. If other parts of your account need to be updated such as your name or email address, you must contact your User Administrator to make those changes.

Steps to Update Account Information

1 Click the **My Account** link in the Top Navigation.

2 Update Account Information such as **Telephone Number** or select the **Password Reset** option to submit a request to have your password reset.

3 Click the **Save** button.

Navigate to My Account
The My Account link is location in the Top Navigation.

Make Your Account Update and Save
This page allows you to change your Work Telephone Number or to submit a Password Reset request.

- **Work Telephone Number**: If you changed your Work Telephone Number, the change will be immediate and you can click the My Account link to see the change.

  It is important to keep your number updated in the event that another MSIX user or an Administrator may need to contact you at work, especially in cases where direct communication is necessary to resolve issues pertaining to one of your state's students.

- **Password Reset:** When submitting a request to reset your password, MSIX will automatically send an email with your MSIX randomly-generated, *temporary* password. This email will be similar to the sample shown in the "Logging In" section of this manual.

  With your *temporary* password, you can log into MSIX and then will be prompted to change the password using the MSIX password standards. In

addition, according to U.S. Department of Education (ED) security policy, you cannot use your **six previous passwords.**

Review Confirmation of Your Action

The "Confirmation" page displays a message that your request has been updated. The page also has navigational links to navigate to different pages of MSIX.

Section 3: Searching, Printing Records, and Notifying

There are certain functions that are helpful tools for teachers, guidance counselors, Migrant Education Program (MEP) data entry staff, recruiters, registrars, and Data and Regional Administrators as they attempt to gain a greater understanding and communicate about a particular student for placement purposes and other needs.

The Migrant Student Information Exchange (MSIX) provides the ability to search and display student records to assist in student placement. These student records can be printed when a paper copy is needed. MSIX also allows a means to send email notifications to another school about a student's pending arrival or departure. These MSIX functions are limited to MSIX Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators.

This section includes the following topics:

- Searching and Displaying
    - Using Search and Display to View a Consolidated Record
    - Using Search and Display to View an Historical Record
    - Understanding Privacy Act Compliance
    - Reviewing the Raw Student Record View
    - Using Advanced Search
- Printing Student Records
- Notifying of a Student's Arrival or Departure

Searching and Displaying

MSIX Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators can look for a single student record by the Student's Name, MSIX ID, or the combination of State and State ID. The Student's Record can be viewed at a high level with the **most recent** enrollments in the "Consolidated Student Record View." Or, student records can be viewed **with all** of the student's information in the "Historical Student Record View."

- **Consolidated Student Record View** (displays the <u>**most recent**</u> student information) – This view can be used to verify the identity of the student for whom you are searching. It provides the ability to flag a record for the merge and split processes. This view also provides the ability to send an email notification upon a student's arrival or departure.

- **Historical Student Record View** (<u>**displays all**</u> schools and all MEP program information) – This view can be used to determine proper course placement or confirm student identity. Under the Enrollments section, MSIX displays the Data Administrator associated with each student's records for each state. This help users to identify the correct Data Administrators if contact is needed for questions or issues regarding a student's records.

Search for a Student Error Messages

MSIX displays one of the following error messages when you have entered invalid or no search information:

Search for a Student Error Messages	
Scenario	**Error Message**
State Field is Blank	**Error:** Please select a state.
MSIX ID Contains Letters vs. Numbers	**Error:** Please enter a numeric value for the MSIX ID.
First Name Field is Blank	**Error:** Please enter at least 1 character for the First Name.
Last Name Field is Blank	**Error:** Please enter at least 1 character for the Last Name.
No Data was Entered in a Field	**Error:** Please enter at least one search criteria.
Information is not Contained in MSIX	**Error:** No results were found. Please click the refine search link to narrow the search criteria.

Table 3.1: Search for a Student Error Messages

Using Search and Display to View a Consolidated Record

Steps to Search

1 Click the **Student Search** link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2 On the "Basic Student Search" page, enter the **search criteria** by using at least one of the following fields:

1. Student **MSIX ID**

2. **Student State ID**

3.   Student **First**, **Middle**, or **Last Name**

Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3 MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a Partial search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

Use "Exact" to search for an exact match to the information that you entered. If no data returns, change to a "Partial" search just in case there is a minor difference in the data.

4 Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5 Select an individual student record from the list by clicking on the student's **MSIX ID** or **State Student ID** link.

6 A column is provided on the right-hand side of the page where students can be **flagged** as potential matches. Multiple students can be flagged for merge in this column.

Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.

Select and Flag the Student Record

This page displays the results returned from your search. You can sort the search results by clicking on the column names. In this sample, the data is sorted by the "Date of Birth" column.

View the Most Recent Information for the Student

When you select an individual student from the list of search results, you see the student's most recent demographic information on the "Consolidated Student Record View" page.

Understanding Privacy Act Compliance

To comply with the Privacy Act of 1974, MSIX records a student or guardian's dispute of the data contained for the student. To modify an MSIX record, parents and students must first work directly with the state where the student is currently enrolled by contacting their local Migrant Education Program (MEP) personnel to view the MSIX record. If parents and/or students are unsure of whom to contact locally, they should contact the State MEP Director. A list is provided at http://www.ed.gov/programs/mep/contacts.html.

- If it <u>is agreed</u> that the information is in error, it must be corrected in the state system before being corrected in MSIX through the regularly scheduled file transfer process.

- If it <u>is *not* agreed</u> that the information is in error and the parents and/or students are not satisfied, they can contact Jennifer Dozier, the MSIX Project Manager, at 202.205.4421 in the Office of Migrant Education(OME). Then, OME would enter a comment to the effect and the dispute would be recorded in MSIX on the Consolidated Student Record View under the Privacy Act tab. The student record would be unchanged in MSIX and mirror that of the state.

More information about parents' and students' rights under the Privacy Act can be found at http://www.usdoj.gov/oip/privstat.htm. The flowchart below displays the events in the appeals process.
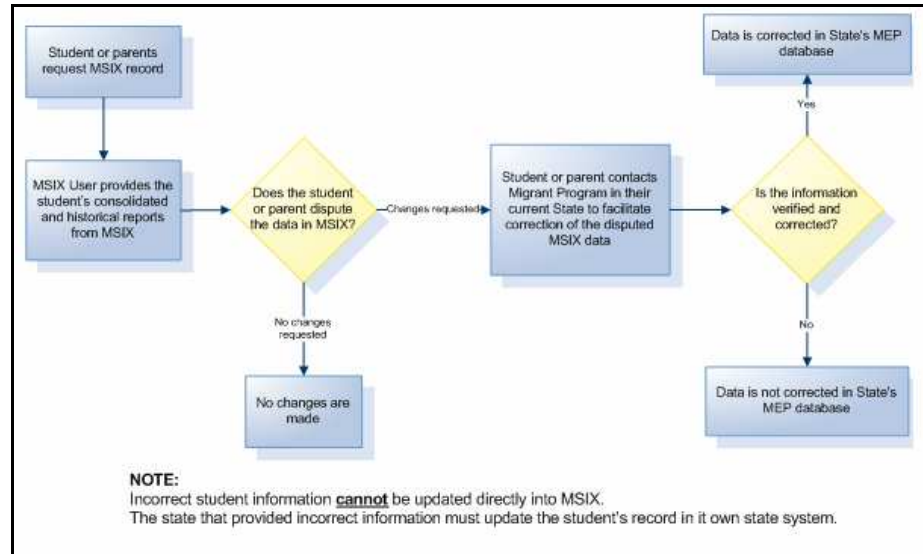
Figure 3.1: Student Record Dispute Appeals Process

Review the Privacy Act Tab Information

The Privacy Act tab is displayed on the sample below because a dispute statement has been entered for this student.

Review the Dispute Statement Comments

The dispute statement that has been entered by a Privacy Act Administrator displayed for this student in the Comments History.

Using Search and Display to View an Historical Record

Steps to Search

1 Click the Student Search link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2 On the "Basic Student Search" page, enter the search criteria by using at least one of the following fields:

1. Student **MSIX ID**

2. **State Student ID**

3. Student **First, Middle, or Last Name**

Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3 MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial

searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

Use "Exact" to search for an exact match to the information that you entered.

4 Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5 Select an individual student record from the list by clicking on the student's **MSIX ID** or **State Student ID** link.

6 A column is provided on the right hand side of the page where students can be **flagged** as potential matches. Multiple students can be flagged for merge in this column.

7 Select the **Historical Student Record View** link on the top of the "Consolidated Student Record View" page. MSIX displays the Data Administrator associated with each student's records for each state. This information can now be found on the "Historical Student Record View" page under the Enrollments section and will help you identify the correct Data Administrator to contact for questions or issues regarding a student's records.

Access the Student Search and Find a Student
This page allows you to search for a student in MSIX.

Select and Flag the Student Record
This page displays the results returned from your search.

View the Most Recent Information for the Student

This page displays the most recent information about this student.

View All MSIX Data for this Student Record

The Historical Student Record View displays all student information from all schools and all Migrant Education Program (MEP) programs. Each student record can be expanded to display Demographic, Qualifying Moves, and Enrollments information.

Reviewing the Raw Student Record View

For Data Administrators, an additional link, the "Raw Student Record View," is displayed on the "Historical Record View" page. This link directs the Data Administrators to a page that contains the unprocessed student data that is directly received from state files. In some situations, the data received from states fails to meet the MSIX standards and is not displayed or is replaced by MSIX reference data. By clicking on the "Raw Student Record View" link and checking the raw data, you may view the student's data as it was originally submitted by the state to validate and verify the integrity of student information in MSIX.

Note the "Raw Student Record View" Link is Available
Data Administrators will see this link if they need to see the original data from the state.

View the Raw Date in the Various Sections

Each section of the student record can be expanded to display raw data in the Demographic, Qualifying Moves, and Enrollments information.

Using Advanced Search

The MSIX Primary Users, Secondary Users, State Data Administrators, Regional Data Administrators and District Data Administrators can look for a single student record using additional data elements on the "Advanced Student Search" page.

Steps to Conduct an Advanced Search

1 Click the **Student Search** link in the Left-side Navigation, which will take you to the "Advanced Search" page.

2 Click on the **Advanced Search** link at the top of the "Basic Student Search" page.

3 On the "Advanced Student Search" page, enter the **search criteria** by using at least one of the following fields:

1. Student **MSIX ID**

2. **State Student ID**

3. Student **First, Middle, or Last Name**

Additional optional information such as Birth Country, Birth State, Parent's names, and the Multiple Birth Flag can be entered on the

"Advanced Student Search" page to further refine the Student Search Results. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

4 MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

Use "Exact" to search for an exact match to the information that you entered.

5 Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

6 Select an individual student record from the list by clicking on the student's **MSIX ID** or **State Student ID** link.

Access the Student Search to Find a Student

The "Basic Student Search" page links you to do an advanced search.

Use Additional Fields to Search for a Student Record

Advanced Search allows users to search for students on additional search criteria. Notice that there are nine more fields on the "Advanced Student Search" page than in the "Basic Student Search" page. Those additional fields are highlighted below in yellow for this illustration, but are not highlighted in the MSIX application.

Locate the Student

This page displays the results set returned from your search.

Printing Student Records

The MSIX Primary Users, MSIX Secondary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators can print a student record using a selected print format.

Steps to Print

1 Click the Student Search link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2 On the "Basic Student Search" page, enter the search criteria by using at least one of the following fields:

1. Student **MSIX ID**

2. **State Student ID**

3. Student **First, Middle, or Last Name**

Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3 MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial

searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter partial DOB information, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen.

Use "Exact" to search for an exact match to the information that you entered.

4 Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5 Select an individual student record from the list by clicking on the student's **MSIX ID** or **State Student ID** link.

6 Select the **HTML** (HyperText Markup Language), **PDF**, or **MS Word** printing icons on the "Consolidated Student Record View" page.

7 Select the **report section(s)** that you would like to print.

8 Select **Print** from the **File** menu of the new MS Word, Adobe, or Explorer window.

9 **Open** the document and **Print** as you would normally print a document.

Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.

Select the Student Record
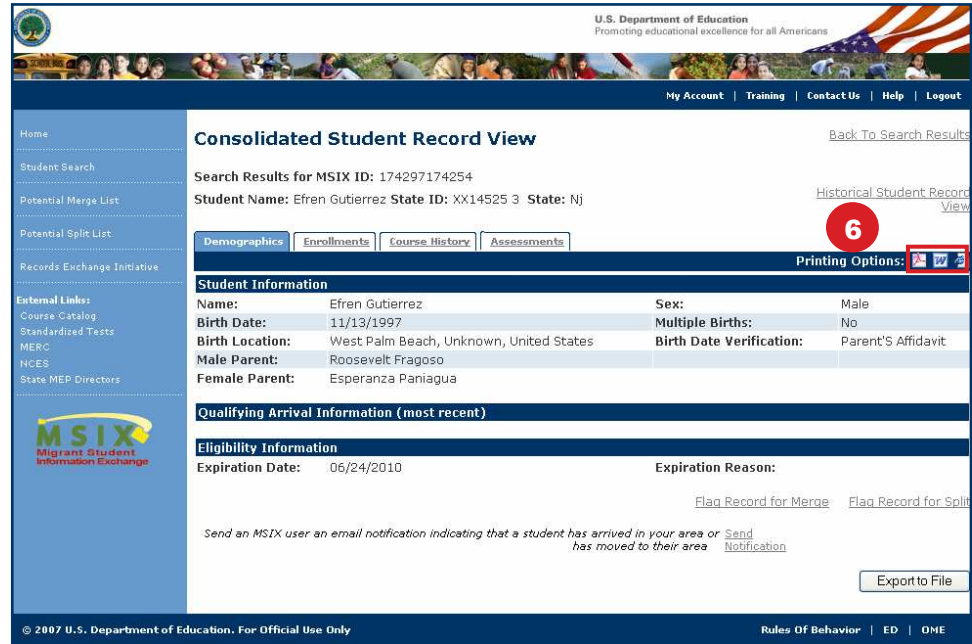
This page displays the results returned from your search.

Determine the Preferred Printing Option

MSIX allows you to print the student file in one of the following formats: Adobe PDF, MS Word, or as an HTML page.

Select the Report Content

Users are provided with the ability to select the sections of the Consolidated Student Report they would like to print. When a user attempts to print a Consolidated Student Report by clicking on one of the different printing options (HTML, PDF, Word file), an option box appears that allows them to identify and print only the data they currently need, while suppressing other information they do not. You can filter what you print by selecting either individual sections (Demographics, Enrollments, Course History, Assessments) of the report or can print all of the report by selecting the "Print All" option.

Proceed to Print a Consolidated Report

Users are provided with the ability to select the sections of the Consolidated Student Record View.
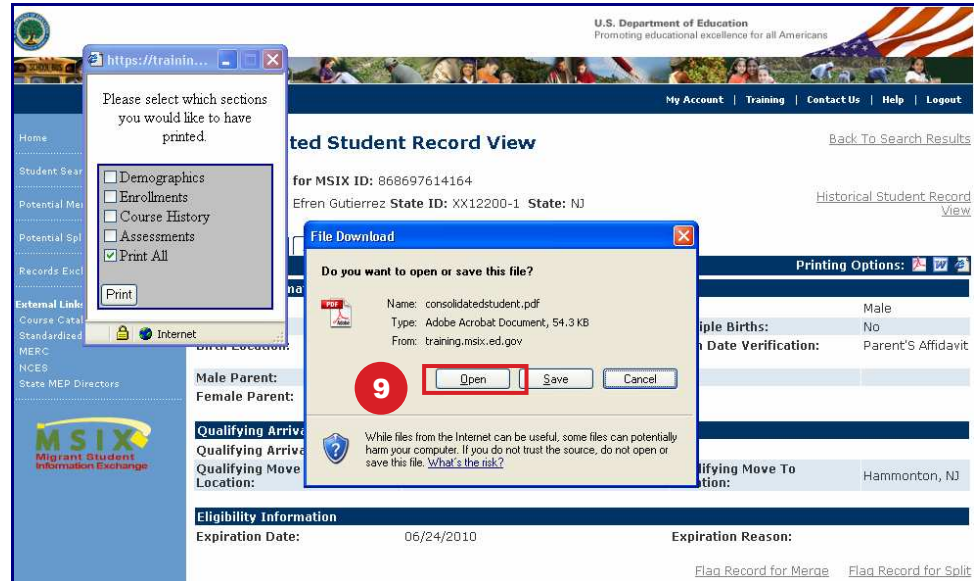
View the Record Results

Prior to printing, you can view the report results to determine if it is exactly what you intended.

Notifying of a Student's Arrival or Departure

MSIX provides an email notification feature to alert another area of a student's relocation in the case of their arrival or departure. As the sender, you will be copied on the email, so it is easier for the recipient to contact you. In addition, you can include comments regarding the student who is relocating. However, it is important to remember that information entered in the "Comments" field will be shared unedited and in their entirety with other MSIX users and you must be careful to protect the student's privacy.

Steps to Send an Email Notification

1 Click the Student Search link in the Left-side Navigation, which will take you to the "Basic Student Search" page.

2 On the "Basic Student Search" page, enter the search criteria by using at least one of the following fields:

1. Student **MSIX ID**

2. **State Student ID**

3. Student **First, Middle, or Last Name**

Additional optional information such as Date of Birth ("Student DOB" field) and Gender ("Sex" field) can also be entered to further refine a search. All of the information entered is used to filter your results. If you are unsure of some of the information, it is better to enter less data rather than more.

3 MSIX will default to a "Partial" search unless you indicate otherwise. Select either **Partial** or **Exact** for each search criteria. If you only know some of the student information, use a "Partial" search. For Partial searches, a wildcard is assumed at the end of the search data entered (e.g., entering "mi" for Last Name finds "Miller" but not "Smith").

This wildcard feature also allows you to search for students based on the date of birth (DOB) when you only have partial date information. If you enter this partial DOB information when conducting a student search, a list of all recorded students that were born on that particular month, date, and/or year will be displayed.

MSIX receives all of its student data directly from states. If your state system stores hyphenated names, then MSIX will display the data with hyphens. The best way to search for hyphenated names is to use the "Partial" search and use the part of the name before the hyphen. You can then locate the name you are looking for in the list of results.

Use "Exact" to search for an exact match to the information that you entered.

4 Click the **Search** button and the "Search Results for Student" page will display. Search results can be sorted by column names by clicking the column name.

5 Select an Individual Student Record link from the list on the search results page by clicking on the Student's **MSIX ID** or **State Student ID**.

6 Click the **Send Notification** link.

7 On the "Email Notification" page, select the **State** to indicate where the message should be sent. Once you have the selected the state, the **District** and **School** fields that are associated with that state will display. You may enter one or both, but they are not required fields. Then, select a **Message** from the available drop-down list choices.

Additional comments can be entered in the "Comments" field. However, to protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. Your comments will be shared unedited and in their entirety with other MSIX users.

8 Click the **Next** button.

9 Verify the Notification information. Then, click the **Yes** button. When you send a student move notification, you will be copied on the email that is automatically sent. This will serve as a confirmation to the person that originated the notification, helping him/her to maintain his/her own records. It will also make it easier for the recipient to respond to the notification by providing your contact information.

Access the Student Search and Find a Student

This page allows you to search for a student in MSIX.

Select the Student Record

This page displays the results returned from your search.

Begin the Email Notification Process

From this page, you can begin to send the email notification by clicking the **Send Notification** link.

Select the New School Location
On this page you create the email notification to identify the state, district, and/or school of a student's change in location.

Verify the Email Content

On this page you verify the email message before you send it.

Sent Email Notification Sample

This is an example of the email notification that is sent to the other state.

Figure 3.2: Student Arrival/Departure Notification Sample

Section 4: Generating Reports

Generating reports is role-based and the data contained in the reports differ based on a user's permissions. The following table provides a summary of the Migrant Student Information Exchange (MSIX) reports by user role.

MSIX Reports	User Admin	Data Admin	Govt Admin
User Management Reports			
User Account List	✔		
User Detail	✔		
User Role	✔		
Worklist Reports			
Open Worklist		✔	
User Worklist		✔	
Region Worklist Aging Summary Report		✔	
Worklist Aging Report		✔	
State Data Reports			
State Data Quality		✔	✔
State Data Load		✔	✔
Federal Data Reports			
Federal Data Quality			✔
Federal Data Load			✔
OME Reports			
MEP Student Counts by Demographic Category			✔
MEP Student Enrollment			✔
MEP Student Assessment			✔
MEP Student Grade Retention			✔
MEP Student Proficiency			✔
Mobility			✔
Ad Hoc OME Reports			
MEP Student Missed Enrollment			✔
Timeliness of MSIX Data			✔
Placement			✔

Table 4.1: MSIX Reports

This section includes the following topics:

- User Administrator Reports
- Data Administrator Reports
- Government Administrator Reports
- Generating a Report

User Administrator Reports

MSIX provides User Administrators with three User Management Reports to view information about the MSIX users in your state. There are three reports found under the Reports link on the Left-side Navigation on the User Administration home page. By clicking on that link, you will reach the "User Management Reports" page that lists the User Account List Report, the User Detail Report, and the User Role Report.

Data contained in the MSIX User Management Reports is retrieved from MSIX periodically throughout the day. Due to these periodic updates, the information contained in the reports may not contain updates made in MSIX within the past hour. You can view a report or print it as you would any web page.

- **User Account List Report** — This report supports "Security Compliance Reviews" to determine if users have the appropriate level of access to MSIX. Reviews are also done to monitor whether a user is still actively using MSIX or if the account should be deactivated.

- **User Detail Report** — This report provides greater detail about users by including location and contact information, which may be helpful if you need to communicate with a group of users.

- **User Role Report** — This report provides users grouped by role, which may be useful to identify individuals for role-based training or if you wanted to add a second role to a user group.

The table below gives a snapshot of the data fields or column headings found in each report.

User Management Reports			
Column Headings	User Account List	User Detail	User Role
Name	✔	✔	✔
User ID	✔	✔	✔
Role		✔	✔
Status	✔	✔	✔
Address		✔	
Contact *(email & phone #)*		✔	

User Management Reports			
Column Headings	**User Account List**	**User Detail**	**User Role**
Organization		✔	✔
Last Login Date	✔		
Account Expiration Date	✔		
Account Activation Date	✔		
Account Creation Date	✔		
Status Date	✔		

Table 4.2: User Management Reports

Data Administrator Reports

MSIX provides Data Administrators with two groups of reports: Worklist Reports and State Data Reports. The following reports are found in each group:

Worklist Reports

- **Open Worklist Report** — This report provides worklist items that are still pending resolution.

- **User Worklist Report** — This report provides worklist items grouped by user.

- **Region Worklist Aging Summary Report** — This report provides worklist items grouped by regions and worklist type with by the number of days they have been in progress.

- **Worklist Aging Report** — This report provides worklist items grouped by district and worklist type with the number of days they have been in progress.

The table below gives a snapshot of the data fields or column headings found in each report.

Worklist Reports				
Column Headings	**Open Worklist**	**User Worklist**	**Region Worklist Aging Summary Report**	**Worklist Aging Report**
Assigned To	✔			
Created By	✔			
Date Created	✔			
Measure *(# of days)*			✔	✔
Region	✔		✔	
Resolution		✔		

Worklist Reports				
Column Headings	**Open Worklist**	**User Worklist**	**Region Worklist Aging Summary Report**	**Worklist Aging Report**
School District	✔			✔
State	✔	✔		
Student Name	✔	✔		
User ID		✔		
Worklist Item Created		✔		
Worklist Item Resolved		✔		
Worklist Type	✔	✔	✔	✔

Table 4.3: Worklist Reports

<u>State Data Reports</u>

- **State Data Load Report** — This report provides the number of student records that were loaded successfully into MSIX compared to the total number received over a given period of time (day, week, month, year).

- **State Data Quality Report** — This report provides the number of student records loaded into MSIX that were without issues out of a total number received over a given period of time (day, week, month, year).

The tables below gives a snapshot of the data fields or column headings found in each report.

State Data Load Reports Column Headings
File Received Date
State Name
Total Records Received
Tot Records Processed
Tot Records Rejected

Table 4.4: Data Load Reports

State Data Quality Reports Column Headings	
File Received Date	Birth Date
State Student ID Type	Birth State
Reporting State Code	Birth Date Verification
First Name	Birth City
Middle Name	Birth Country

State Data Quality Reports Column Headings	
Last Name 1	Male Parent First Name
Last Name 2	Male Parent Last Name
Suffix	Female Parent First Name
Multiple Birth	Female Parent Last Name
Gender	Eligibility Expiration Date
	Continuation of Services

Table 4.5: Data Quality Reports

Data contained in the MSIX Data Administrator reports is retrieved from MSIX periodically throughout each day. Due to these periodic updates, the information contained in the reports may not contain updates made in MSIX within the past hour. You can view a report or print it as you would any web page.

Government Administrator Reports

MSIX provides Government Administrators with State Data Reports, Federal Data Reports (the column headings are the same as with the State Data Reports), OME Reports, and OME Ad Hoc Reports.

State and Federal Data Reports

Both the Federal and State Data Reports that Data Administrators use and contains the same data fields or column headings. The Federal Data Reports include the following:

- **State and Federal Data Load Report** — This report provides the number of student records that were loaded successfully into MSIX compared to the total number received over a given period of time (day, week, month, year).

- **State and Federal Data Quality Report** — This report provides the number of student records that were without issue out of a total number received that were loaded into MSIX over a given period of time (day, week, month, year).

OME Reports

The OME Reports are federal reports that provide data by school, district, state, and nationally for a given period of time. They include the following:

- **MEP Student Counts by Demographic Category** — Provides a count of MEP students across demographic categories

- **MEP Student Enrollment** — Provides a count of all MEP students enrolled by grade

- **MEP Student Assessment** — Provides the percentage of enrolled MEP students assessed by grade, demographic category, and subject
- **MEP Student Grade Retention** — Provides the number of MEP students placed in the same grade for two consecutive years and enrolled in a summer program
- **MEP Student Proficiency** — Provides the number of MEP students assessed as proficient by grade, demographic category, and subject
- **Mobility** — Provides the number of MEP students that made interstate and intrastate moves

OME Ad Hoc Reports

The OME Ad Hoc Reports are user-generated reports that can be saved and accessed at a different point in time. These reports include the following:

- **MEP Student Missed Enrollment** — Provides the number of MEP students with an interstate Qualifying Arrival Date (QAD) without a corresponding enrollment in the receiving state
- **Timeliness of MSIX Data** — Provides the number of occurrences of students enrolled in a migrant program prior to having a withdrawal date from a previous school
- **Placement** — Provides the number of MEP students properly and improperly placed for a given enrollment

Generating a Report

Reports can be generated by the State Data Administrators, Regional Data Administrators, and Government Administrators.

Steps to Generate a Report

1 Click the **Reports** link in the Left-side Navigation. Government Administrators will also have options of selecting an **OME** link.

2 You will go a central reports page where you can make your next selection. The page you find will be based on your role.

3 As a first-time user of a report, you must refresh the page to open the report for the first time. You <u>will not have</u> this step again for this report. You <u>will have</u> this step for any other report you have not previously opened.

Access the Reports Link
Click the Report link to reach the central page for reports available to your role.
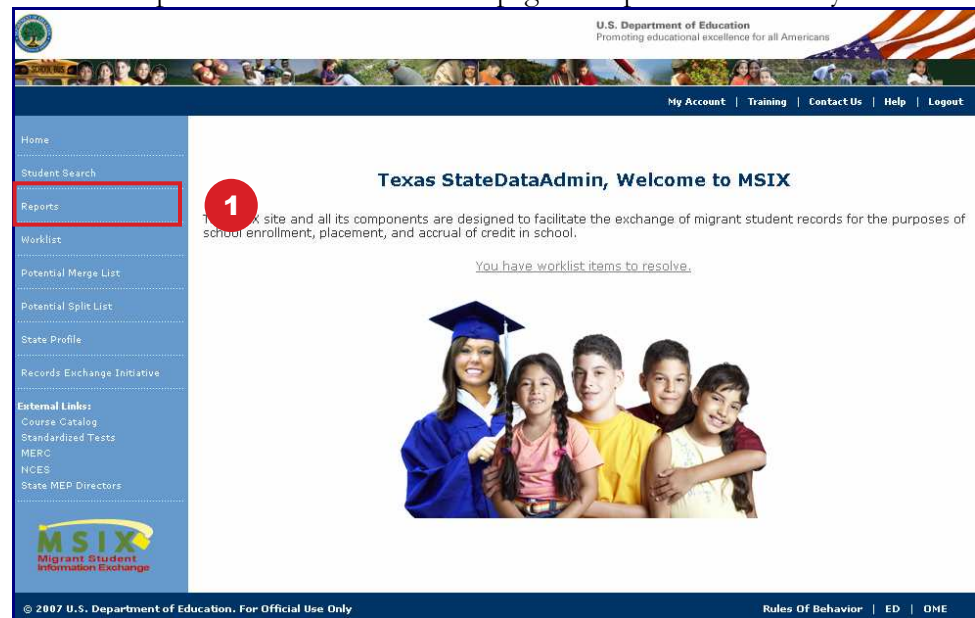
Use the Central Reports Page to Select Your Report
Depending on your role, you will navigate to the one of the following pages:

(1) The **User Administrator** will see the following series of pages.

(2) The **<u>Data Administrator</u>** will see the following series of pages.

(3) The **Government Administrator** will see the following series of pages.
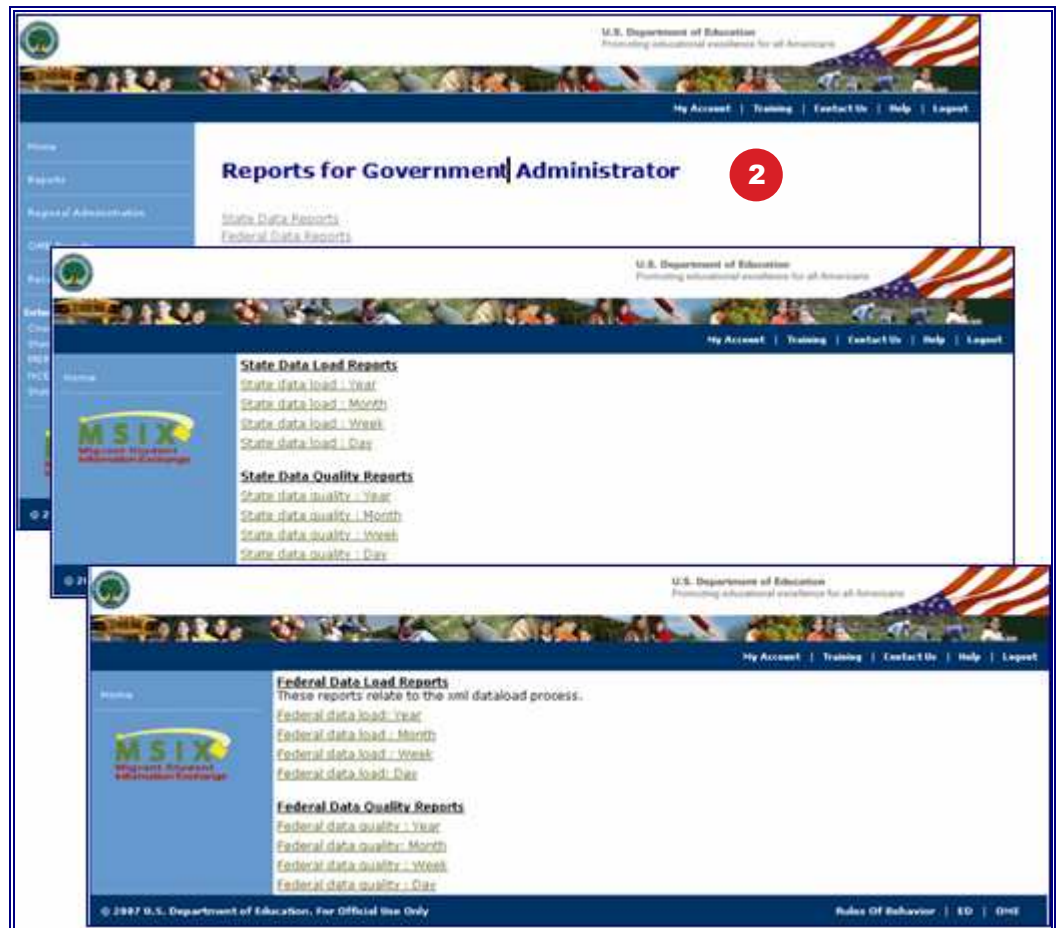
Refresh the Portlet for First-time Use

Click **Refresh Page** to refresh the portlet and open the report.
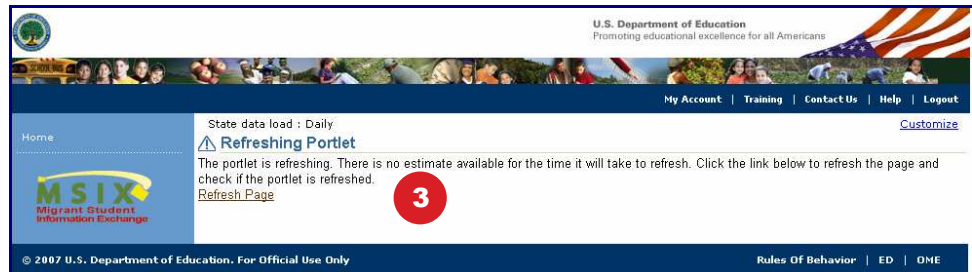
Section 5: Merging and Splitting Records

At the heart of the Migrant Student Information Exchange (MSIX) is the ability to collect, review, and reconcile migrant student records nationwide to result in one unified database. This is accomplished by both electronic means and through human intervention. This data management effort seeks to merge records where duplicates are found and split records where they may have been merged in error.

The tasks around merging and splitting are limited to MSIX Primary Users, State Data Administrators, Regional Data Administrators, and District Data Administrators. This section includes the following topics:

- MSIX Data Management
    - Data Management by the MSIX Application
    - Data Management by MSIX Users
- Merging/Combining Student Records
    - Processing a Near Match Merge
        - o Evaluating a Near Match
        - o Validating or Rejecting a (Near Match) Merge
    - Processing a User Initiated Merge
        - o Submitting a User Initiated Merge
        - o Canceling a User Initiated Merge
        - o Validating or Rejecting a User Initiated Merge
- Splitting/Separating Student Records
    - Processing a User Initiated Split
        - o Submitting a User Initiated Split
        - o Canceling a User Initiated Split
        - o Validating or Rejecting a User Initiated Split
- Escalating Merge and Split Requests

MSIX Data Management

Student records are uploaded into MSIX from states periodically to ensure the MSIX database has the most recent and comprehensive information. There are two ways this information is managed:

- **By the MSIX Application** — When a record is uploaded, MSIX reviews the record to analyze whether it already exists in MSIX or is a new record.

- **By Human Intervention** — At any time after the student record is in the MSIX database, a user can intervene to initiate merging/combining or splitting/separating the record.

Data Management by the MSIX Application
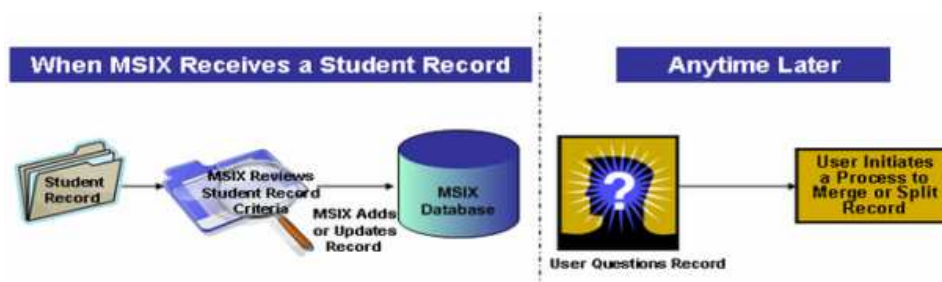
Figure 5.1: MSIX Data Management

When student records are imported into MSIX, they are evaluated to determine if they are new or potentially match an existing MSIX record. This is done with a "Matching Engine" that produces a Matching Score using several pieces of demographic data. Based on the resulting score, one of the following occur::

- **New MSIX Record** — No existing record matches, so a new record is created.

- **Merge** — The new record *closely matches* an existing MSIX record and is combined or merged with that record.

- **Near Match** — The new record *somewhat matches* an existing MSIX record, but the results are not conclusive. Therefore, human review by a State, Regional, or District Data Administrator is required to validate if the record does match a student record or is a new record.

Record	Matching Score Results
New MSIX Record	Sufficiently different from any other MSIX record
Merge	Over a specified level that indicates a close match
Near Match	Somewhere between the Merge and New MSIX Record thresholds

Table 5.1: Matching Engine Results

Data Management by MSIX Users

The MSIX Matching Engine is the initial activity to review student records for similarity. However, situations may arise when a user realizes that student records should be reconciled by merging or splitting the records:

- **Merge** — If more than one record exists for the same student, the records should be merged/joined together to result in one MSIX ID. A Primary User or a Data Administrator can request a merge using the Initiate Merge process.

- **Split** — If one record exists for two students, the records should be split/separated to result in two MSIX IDs. A Primary User or a Data Administrator can request a split using the Initiate Split process.

A merge or split that is initiated by a user is sent to a State, Regional, or District Data Administrator to review the record. If a Data Administrator initiates the request, it is sent to another Data Administrator for review.

Merging/Combining Student Records

A key MSIX feature is to link or merge a student's records from multiple states so all of the student's information is contained in a single MSIX record. Student record merges are identified automatically when state files are loaded into MSIX. The MSIX Matching Engine scores matched records based on the demographic data they contain. If records match over a specified score threshold, they are automatically merged. If the matching score indicates that a new record is sufficiently different from any other record in MSIX, a new MSIX ID is automatically created.

The Merge Process begins in one of two ways: (1) when multiple records are identified by the MSIX Matching Engine as a "Near Match" and therefore are a candidate for merging or (2) when an MSIX user initiates a record merge.

(1) Near Match Merges — Matches that score between the merge and new record thresholds are considered to be "near matches." These records require human review by a Data Administrator to determine whether or not they are a match or a new student record.

(2) User Initiated Merges — A user may find while searching student records that two or more records are clearly for the same student, but have separate MSIX IDs. The user would initiate a record merge, which is automatically routed to the Data Administrators for any open student enrollments on the student record.

Data Administrators review the merge and validate or reject a user-initiated merge if they determine that the records should remain separate.

This sub-section will include the following topics:

- Processing a Near Match Merge
  - o Evaluating a Near Match
  - o Validating or Rejecting a (Near Match) Merge
- Processing a User Initiated Merge
  - o Submitting a User Initiated Merge
  - o Canceling a User Initiated Merge
  - o Validating or Rejecting a User Initiated Merge

Processing a Near Match Merge

A Near Match involves student records that the MSIX Matching Engine found to be a close but not an absolute match. A Data Administrator must intervene to determine whether student records should be merged or remain separate. The figure below reflects the process workflow for a Near Match.
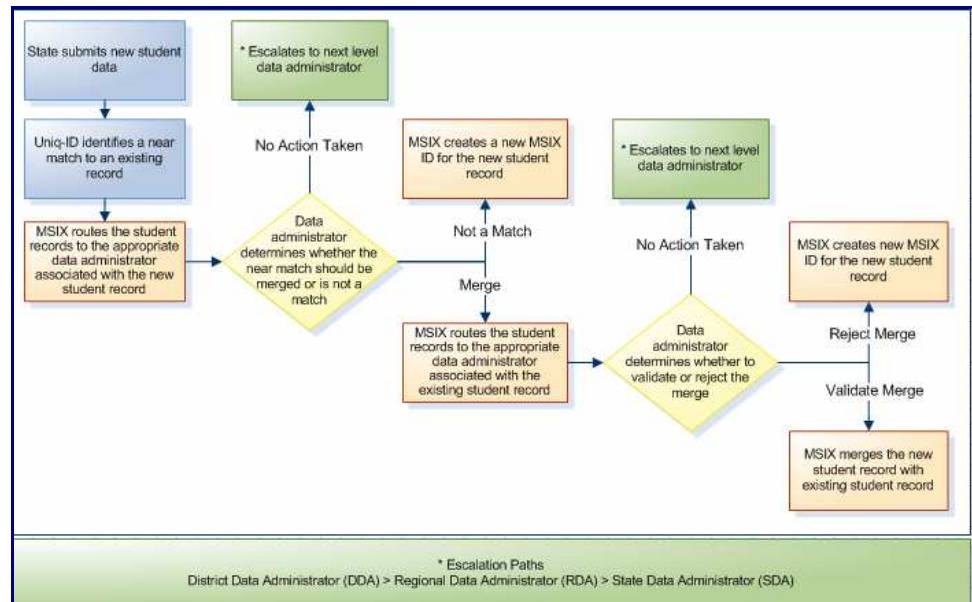
Figure 5.2: Workflow for Near Match Resolution

There are basically two phases in processing a Near Match.

- Phase 1: Evaluation — The Near Match need to be reviewed to evaluate its legitimacy (i.e., make a decision to merge or leave it as two records).

- Phase 2: Validation or Rejection — The Near Match must be validated as a merge or reject and remain as separate records (i.e., follow through on the decision).

Once a near match has been validated by the State, Regional, or District Data Administrator, MSIX reflects that student record change the following day.

Evaluating a Near Match

Steps to Evaluate a Near Match

1 Click the **Worklist** link on the Left-side Navigation, which will take you to the "Worklist" page.

2 On the "Worklist" page, click on a student record link under the **Near Matches** heading.

3 If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX Users.

4 Review the records to determine if they should be joined or remain separate as they are. If you decide to leave the records unchanged, click the **Not a Match** button. If you decide to combine the records, click the **Merge Record** button.

Access and Review the Worklist
The Worklist displays the assigned match resolution or merge validation task(s).

Add a Comment (if appropriate) and Make a Decision

The "Near Match Resolution" page displays the near match records that require human resolution. Based on your decision, click **Not a Match** to *disagree* with the Near Match or **Merge Record** to *agree* with the Near Match.

BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Review the Near Match Merge Confirmation

The "Confirmation" page indicates that the records were successfully merged and that a State, Regional, or District Data Administrator was notified to review and Validate the Merge.

Review the Near Match Reject Confirmation

The "Confirmation" page verifies that the student were not merged and a new MSIX ID was created for the new student record.

Validating or Rejecting a (Near Match) Merge

Once a Near Match has been resolved, it is ready to validated or rejected. Once a near match has been validated by the State, Regional, or District Data Administrator, MSIX reflects that student record change the following day

Steps to Validate or Reject a (Near Match) Merge

1 Click the **Worklist** link on the Left-side Navigation, which will take you to the "Worklist" page.

2 On the "Worklist" page, select an item by clicking on a **Student Record** link under the "Validate Merge" column heading.

3 If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers

3 or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users.

4 Review the records to determine if they should be joined or remain as they are. If you decide to leave the *records unchanged*, click the **Reject Merge** button. If you decide to *combine the records*, click the **Validate Merge** button.

Access and Review the Worklist

The Worklist displays the assigned match resolution or merge validation tasks.

Validate or Reject the Merge

Validate Merge allows you to validate or reject student record merge requests.

BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Validate Merge Confirmation

The sample "Confirmation" page below is the result if you select the **Validate Merge** button.

Reject Merge Confirmation

The sample Confirmation page below is the result if you select the **Reject Merge** button.

Merge Completion Notification

The email notification is sent to confirm that the Match has been <u>accepted</u>.

The sample reflects another student record merge occurrence.

Figure 5.3: Sample Merge Acceptance Email

Merge Rejection Notification

The email notification is sent to confirm that the Match has been <u>rejected</u>.

The sample reflects another student record merge occurrence.

Figure 5.4: Sample Merge Rejected Email

Processing a User Initiated Merge

A user can initiate a merge when one or more records appear to belong to the same student. A Primary User or a Data Administrator can request a merge using the Initiate Merge process. Once a merge has been initiated, MSIX automatically notifies a State, Regional, or District Data Administrator to review and validate the merge. The figure below reflects the process workflow for User Initiated Merge.
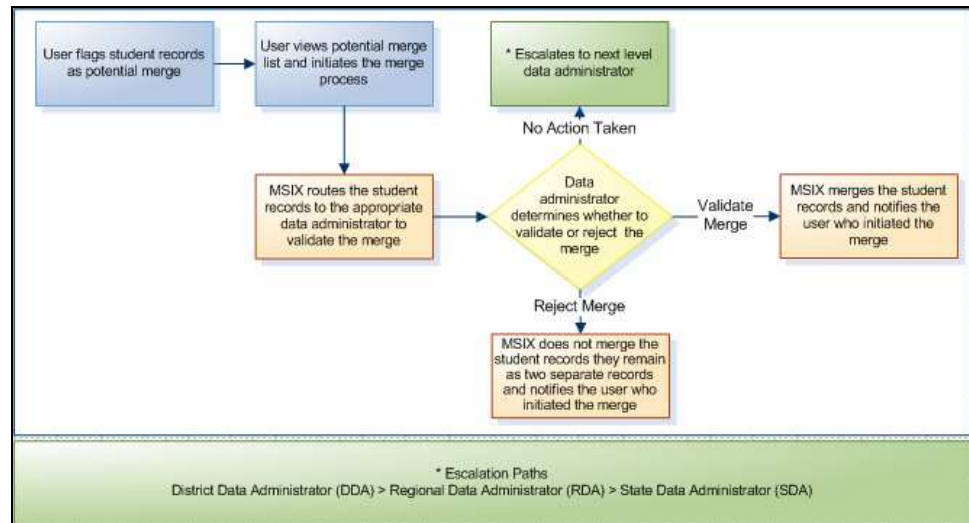
Figure 5.5: Workflow for User Initiated Merge

Submitting a User Initiated Merge

As a Primary User or Data Administrator, you can flag a student record for a potential merge if it appears that two or more records actually belong to the same student. A user determines that student records should be merged when searching and displaying student records if he or she finds records which are clearly for the same student, but have two separate MSIX IDs. The user may then initiate a record merge. These merges are then routed by MSIX to the appropriate State, Regional, or District Data Administrators, based upon the open student enrollments in the student record.

Merge Error Message

MSIX displays an error message if you attempt to flag a student for merge that has already been flagged by another user. You may see the following error message:

Merge Error Message	
Scenario	**Error Message**
Another User has Flagged the Student for Merge	MSIX was unable to flag these records for merge/split. See section "Unsuccessful Merge Flag Attempts" for further information. Click here for a list of Data Administrators associated with these students.

Table 5.2: Merge Error Message

Steps to Initiate a Merge

1 Search for all students who qualify for potential merge. Select an **Individual Student Record MSIX ID** link from the list on the "Search Results for Student" page. At this point, it is *assumed* that you have reviewed the student records thoroughly using the "Consolidated Student Record View" (showing the most recent information) and the Historical Student Record View" (showing all information about the records).

2 You can flag the records for merge by using either of two methods: (a) the "Search Results for Student" page or (b) the "Consolidated Student View Record" page.

Option A: "Search Results for Student" Page — For each potentially matching student, select the option box next to the student name. Then, click the **Flag Record(s) for Merge** button to add the record to the Potential Merge List.

Option B: "Consolidated Student View Record" Page — For each potentially matching student, click on the **Flag Record for Merge** button to add the record to the Potential Merge List.

3 Click on the **Potential Merge List** link in the left navigation.

4 Select the student records to merge and click the **Process Merge** button.

5 Select the record to be the master student record. The master student record is the one which keeps the current MSIX ID. The other student records are combined into the master student record's MSIX ID.

6 Click the **Merge** button.

Locate Student Records to Merge

This page displays the results returned from your search. Here, you can use Option A and check the option next to the student names and **Flag the Record(s) for Merge**.

Use Option B to Flag Record for Merge on the Consolidated Student View
On a "Consolidated Student Record View" page, you can flag a record for merge.

Process the Merge from the "User Initiated Merge Records" List
The "User Initiated Merge Records" list displays the student records that have been flagged for merge.

Select the Master Student Record

Select the option for MSIX ID that will be the master student record.

View the Merge Confirmation

The confirmation page indicates the merge was successfully initiated and has been routed to a Data Administrator for validation.

Canceling a User Initiated Merge

Primary Users and Data Administrators can cancel a request for a student record merge if needed. It is possible that you would learn more about the student records and determine the records should remain separate. You can cancel the merge request to prevent it from going further into the Merge Process.

Steps to Cancel a Merge

1 Click on the **Potential Merge List** link in the Left-side Navigation.

2 Select the student records to remove from the Potential Merge list by checking the option box. Then, click the **Cancel Merge** button.

Access and Remove the Potential Merge
The Potential Merge List displays records to remove from the Potential Merge.

View the Cancel Merge Confirmation

The "Confirmation" page verifies the merge was canceled and the records removed from the Potential Merge List.
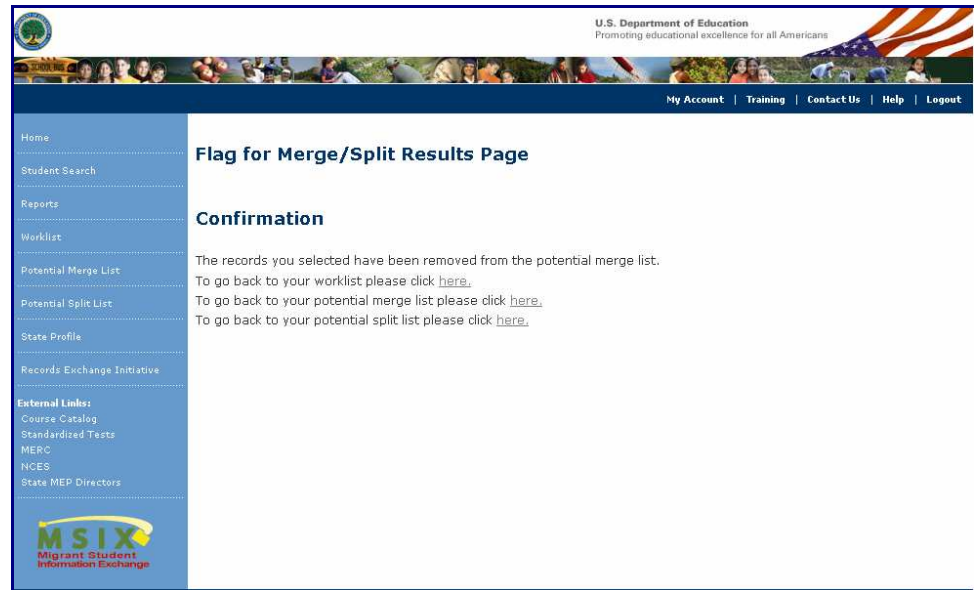
Validating or Rejecting a User Initiated Merge

This MSIX function allows you to validate or reject a user initiated student record merge request. Once a near match, merge or split has been validated by the State, Regional, or District Data Administrator, MSIX reflects that change the following day.

Steps to Validate or Reject a User Initiated Merge

1 Click the **Worklist** link on the Left-side Navigation.

2 On the Worklist page, click on a **Student Record** link under the Validate User Initiated Merge heading.

3 If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users.

4 Review the records to determine if they should be joined or remain as they are. If you decide to leave the records as they are, click the **Reject Merge** button. If you decide to combine the records, click the **Validate Merge** button.

Access and Review the Worklist

The Worklist displays the match resolution, merge or split validation tasks. Select the student record that is under consideration.

Validate or Reject the User Initiated Merge

Validate User Initiated Merge allows you to validate or reject merge requests.

BOTH A MERGE CONFIRMATION AND REJECT CONFIRMATION ARE SHOWN

Validate Merge Confirmation

The sample "Confirmation" page below is the result if you select the **Validate Merge** button.

Reject Merge Confirmation

The sample "Confirmation" page below is the result if you select the **Reject Merge** button.

Merge Notification

The email notification is sent to confirm that the Merge has <u>been accepted</u>.
The sample reflects another student record merge occurrence.

```
From Msix.Application@eds-orlando.com <Msix.Application@eds-orlando.com>
Date: Nov 2, 2007  12:19 PM
Subject: A Merge you initiated has been accepted by MSIX
To: Primary User New Mexico


Hello New Mexico Primary User,

Your request to merge the following two students has been accepted:

Student Name: Angelica Acosta
State Student Id: 22596234RBJ
Submitting State: New Mexico


Student Name: Allan Alonso
State Student Id: 752477LNI
Submitting State: Arizona


Please use the following link to access MSIX: http://msix.ed.gov.


If you have forgotten your login or password, please contact your
appropriate User Administrator.
If you have any questions regarding the contents of this email, please
refer to the online help, user guide and other documentation available
within MSIX.  You may also contact the MSIX Support Team at
msixsupport@deloitte.com.
This email account is not monitored.
```

Figure 5.6: Sample Merge Acceptance Email

Merge Notification

The email notification is sent to confirm that the Merge <u>has been rejected</u>.
The sample reflects another student record merge occurrence.

```
From Msix.Application@eds-orlando.com <Msix.Application@eds-orlando.com>
Date: Nov 2, 2007  12:19 PM
To: Primary User New Mexico
Subject: A Merge you initiated has been rejected by MSIX


Hello New Mexico Primary User,

Your request to merge the following two students has been rejected:

Student Name: Angelica Acosta
State Student Id: 22596234RBJ
Submitting State: New Mexico


Student Name: Allan Alonso
State Student Id: 752477LNI
Submitting State: Arizona


Please use the following link to access MSIX: http://msix.ed.gov.


If you have forgotten your login or password, please contact your
appropriate User Administrator.
If you have any questions regarding the contents of this email, please
refer to the online help, user guide and other documentation available
within MSIX.  You may also contact the MSIX Support Team at
msixsupport@deloitte.com.
This email account is not monitored.
```

Figure 5.7: Sample Merge Rejection Email

Splitting/Separating Student Records

A user can initiate a split when a record that has been incorrectly merged is encountered. The split separates a single merged record into new, separate student records. Once a Split has been initiated, MSIX automatically notifies a State, Regional, or District Data Administrator to review and validate the split. The figure below reflects the process workflow for User Initiated Split.
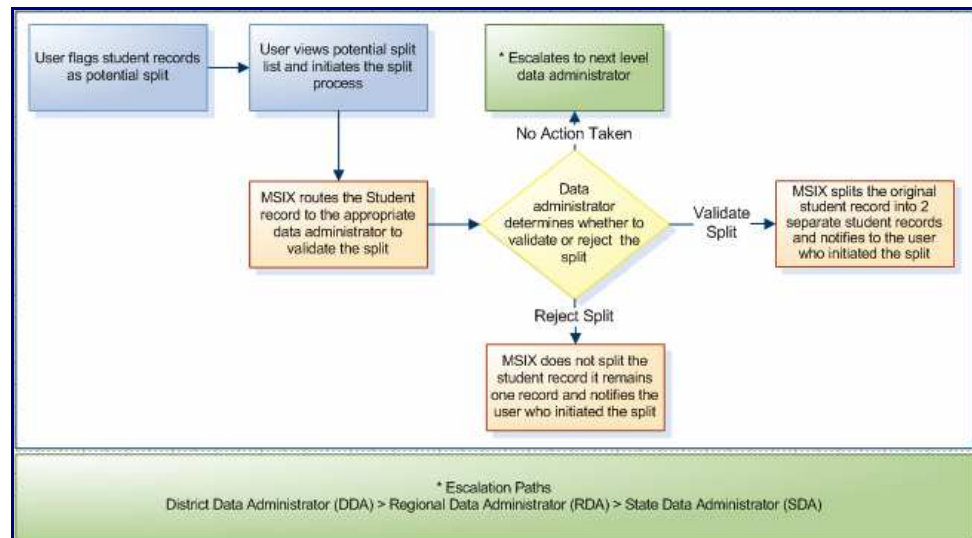
Figure 5.8: Workflow for Splitting Student Records

This sub-section will include the following topics:

- Submitting a User Initiated Split
- Canceling a User Initiated Merge
- Validating or Rejecting a User Initiated Split

Processing a User Initiated Split

The following tasks describe the process to initiate and validate or reject splitting student records.

Submitting a User Initiated Split

As a Primary User or Data Administrator, you can flag a student record for a potential split if it appears that one record actually belong to more than one student. A user determines that student records should be split when searching and displaying student records if he or she finds single records that are clearly for the different student. The user may then initiate a split. These splits are then routed by MSIX to the appropriate State, Regional, or District Data Administrators, based upon the open student enrollments in the student record.

Split Error Messages

MSIX displays an error message if you attempt to flag a student for split that has already been flagged by another user. or when you attempt to split a student record that has no additional historical record. You may see the following error messages:

Split Error Message	
Scenario	**Error Message**
Another User has Flagged the Student for Split	MSIX was unable to flag these records for merge/split. See section "Unsuccessful Split Flag Attempts" for further information. Click here for a list of Data Administrators associated with these students.
Student Record has no Additional Historical Record	In order to split a student record it has to have at least one historical record in MSIX.

Table 5.3: Split Error Messages

Steps to Initiate a Split

1 Locate the student record by using the Student Search process. Select an **Individual Student Record MSIX ID** link from the list on the search results page by clicking on the student's MSIX or State Student ID.

2 On the "Consolidated Student Record View," click on the **Flag Record for Split** button for the student to be split.

3 Click on the **Potential Split List** link in the Left-side Navigation.

4 Select the record to split.

5 Click the **Process Split** button.

6 Indicate the Master Record. The "Master Record" is the one which keeps the existing MSIX ID; the other student record(s) are assigned new MSIX ID.

7 Click the **Split** button.

8 If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users. Confirm the action by clicking **Split Record**.

Access the Student Record
This page displays the results set returned from your search.

Flag Record for Split

On the "Consolidated Student Record View" page, you can flag a record to split.

View the Split Confirmation

The "Confirmation" page below is the result if you initiated a request to split student records.

Access the Potential Split List and Process the Split

The Potential Split List navigates you to your list of student records for a potential split.

Initiate the Potential Split

On the "Initiate Potential Split" page, you select the "Master Record" – the MSIX record that keeps the existing MSIX ID. The other student record(s) are assigned new MSIX ID.

Process the Potential Split

After you have reviewed the records, you are ready to click the **Split Record** button.

Confirmation

The "Confirmation" page indicates that the split was initiated and is routed to a State, Regional, or District Data Administrator for review and validation.

Canceling a User Initiated Split

Primary Users and Data Administrators can cancel a request for a student record split, if needed. It is possible that you would learn more about the student records and determine the records should remain joined. You can cancel the split request to prevent them from going further into the Split Process.

Steps to Cancel a Split

1 Click on the **Potential Split List** link in the left navigation.

2 Select the students to remove from the Potential Split List. Then, click the **Cancel Split** button.

Access the Potential Split List and Cancel
The Potential Split List navigates you to your list of student records for a potential split.

Review the Potential Split as Cancelled

The "Confirmation" page verifies that the split was canceled.
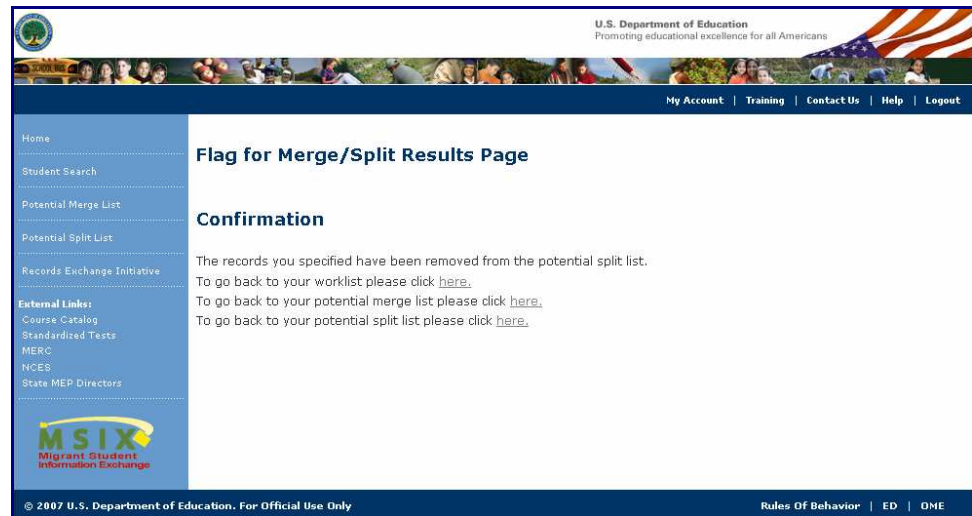
Validating or Rejecting a User Initiated Split

This allows you to validate or reject a student record split. When two student records are split, a new MSIX ID is created for the split record. Once a split has been validated by a State, Regional, or District Data Administrator, MSIX reflects that student record change the following day.

Steps to Validate or Reject Split

1 Click the **Worklist** link on the Left-side Navigation, which will take you to the "Worklist" page.

2 On the Worklist page, select a **Student Record** link from under the "Validate Split" heading.

3 If applicable, enter a justification in the comment field. The comment field may contain up to 250 characters. To protect the student's privacy, do not include any sensitive information such as Social Security Numbers or other Personally Identifiable Information. The comments will be shared unedited and in their entirety with other MSIX users. Review the student records. If they are for different student, select **Validate Split**.

4 Review the records to determine if they should be split or remain as they are. If you decide to leave the records as they are, click the **Reject Split** button. If you decide to combine the records, click the **Validate Split** button.

Access the Worklist and Select a Student Record

The Worklist displays the near match, validate merge and validate split tasks.

Validate or Reject the Split

The Validate Split allows you to reject or validate a record split.

**BOTH A MERGE CONFIRMATION AND REJECT
CONFIRMATION ARE SHOWN**
Review Validate Split Confirmation
The sample "Confirmation" page below is the result if you select the **Validate
Split** button.
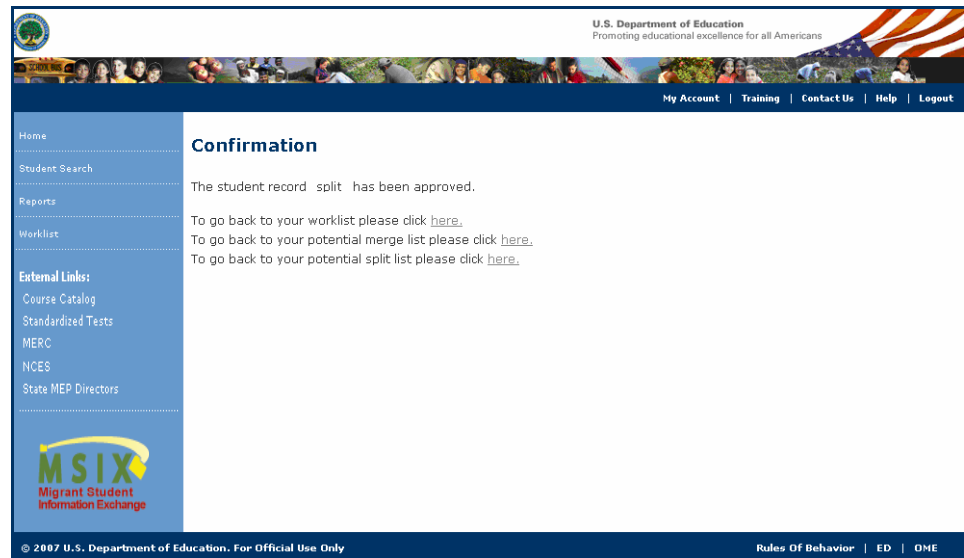
Review Reject Split Confirmation
The sample "Confirmation" page below is the result if you select the **Reject Split**
button.

Split Notification

The email notification is sent to confirm that the Split has <u>been accepted</u>.
The sample reflects another student record split occurrence.

Figure 5.9: Sample Split Acceptance Email

Split Notification

The email notification is sent to confirm that the Split <u>has been rejected</u>.
The sample reflects another student record split occurrence.

Figure 5.10: Sample Split Rejection Email

Escalating Merge and Split Requests

A user's request to merge or split student records is automatically escalated when no action has been taken on a worklist item within a specific time period. The figure below reflects the process workflow for a Near Match.
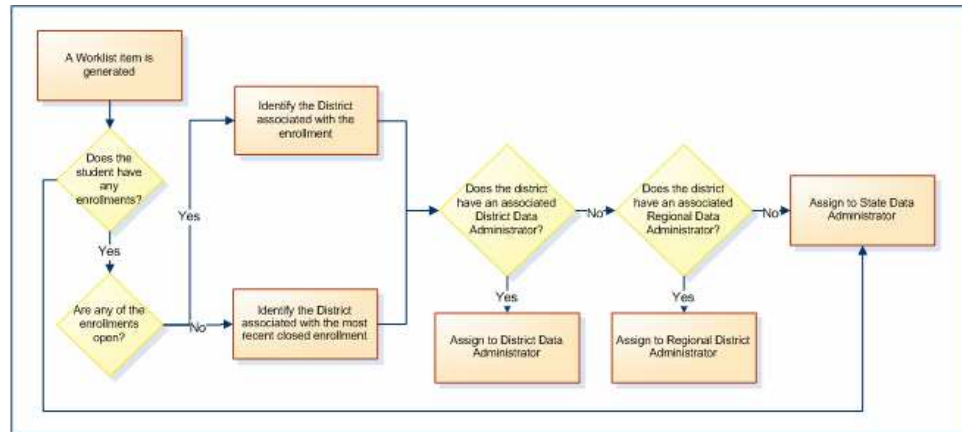
Figure 5.11: Workflow for Work Assignment and Escalation

Depending on your MSIX organizational structure, escalation occurs in a 1-, 2-, or 3-Tiered Workflow. The review process takes a total of 10 days where each reviewer has a limited review time.

- **3-Tiered Workflow** — States with 3 levels of review (district, region, and state)

- **2-Tiered Workflow** — States with 2 levels of review (district and state OR region and state)

- **Tiered Workflow** — States with 1 level of review (state only)

The table below illustrates the review period limits. For example, for a state with a Regional Administrator but no District Data Administrator (2-Tier), the Regional Administrator has 4 days and the State Data Administrator has 6 days for review.

Requests for Merge or Split Escalation Timeline				
Workflow	**Phase 1** **4 Days to Review**	**Phase 2** **4 Days to Review**	**Phase 3** **2 Days to Review**	**After** **Phase 3**
3-Tier	District Data Administrator	Regional Administrator	State Data Administrator	Approved
2-Tier	District Data Administrator	*none assigned*	State Data Administrator	Approved
2-Tier	*none assigned*	Regional Administrator	State Data Administrator	Approved
1-Tier	*none assigned*	*none assigned*	State Data Administrator	Approved

Table 5.4: Requests for Merge or Split Escalation Timeline

Section 6: Regional Structure Administration

Each state has the option of using the Migrant Student Information Exchange (MSIX) regional structure functionality. If a state chooses to use regional structures, the state must set up its own named regions and tie each region to one or more districts. The effort to establish regions within a state is a one-time task. However, the regions will have to be updated if the state alters its regional model. The State Region Administrator is the only role that can create or update the Regional Administration. Office of Migrant Education (OME) users can view all state regional structures. This section includes the following topics:

- Creating a Region
- Updating a Region
- Disabling a Region
- Accessing the State Region Consolidated View

Creating a Region

Steps to Create a Region

1 Click the **Regional Administration** link on the Left-side Navigation menu, which will take you to the "Regional Structure Administration" page.

2 On the "Regional Structure Administration" page, select **Enable Regional Structure**.

3 Select **Enable Regional Structure for User Administration** and **Enable Regional Structure for Data Administration**. Then, click the **Next** button.

4 On the "Current Region" page, enter the **Region Name** and **Description** (optional).

5 On the "Current Region" page, you have **two choices for searching districts**: refine your search using one of the option fields, or enter NO search criteria and pull ALL districts. The option fields include: District Name, County, State District ID, and/or an NCES Code. Using either method, click the **Search** button.

6 The search results can be sorted by the column names by clicking on the column name.

7 Select the **Districts** that will be part of the new region and click the **Add** button (repeat steps 5 and 6 until all associated districts are added).

8 Once all the districts have been added, click the **Save Region** button.

9 Click **Yes** to confirm.

Set Up the Regional Structure
The state enables or disables the regional structure using this page. Check both **boxes** and **Next** to complete this task.

Create a New Region
Create a new region and associate one or more districts to it. Enter a **Region Name** and **search for districts** to associate with the region.

Associate Districts to a Region

Select the districts to add to the newly created region.

Save the Region

When all districts have been selected, the newly created region must be saved.

Review Confirmation of Your Action

Review the region that has just been created on the "Confirmation" page. Then, click **Yes** to approve it.

View the Confirmation

The newly created region is displayed.

Updating a Region

Even after a region has been initially established, you may need to assign new districts or revise the region name or description.

Steps to Update a Region

1 Click the **Regional Administration** link on the Left-side Navigation menu, which will take you to the "Regional Structure Administration" page.

2 On the "Regional Structure Administration" page, select the **Edit** link associated with a region that needs to be updated.

3 Update the **Region Name** and/or **Description** text, if needed.

4 To remove a district, select the option by the **District** that you want to remove by clicking the option next to the District. Then, click the **Remove** button.

5 To add a district, you have **two choices for searching districts**: refine your search using one of the option fields, or enter NO search criteria and pull ALL districts. The option fields include: District Name, County, State District ID, and/or an NCES Code. Using either method, click the **Search** button.

6 Once the Region update is completed, click the **Update Region** button.

7 Click the **Yes** button on the "Confirmation" page.

Access Regional Structure Administration

After the regions and districts have been updated in the regional structure, the page then displays all the regions and districts that have been added. The page becomes the regional structure landing or central page where you can update the regional structure options, link to the edit region page, enable regions, add new regions, and print each section.

Update the Region

The region and district can be updated on this page in several areas.

Review Confirmation of Your Action

Confirm the region has been created on the "Confirmation" page. Then, click **Yes** to approve it.
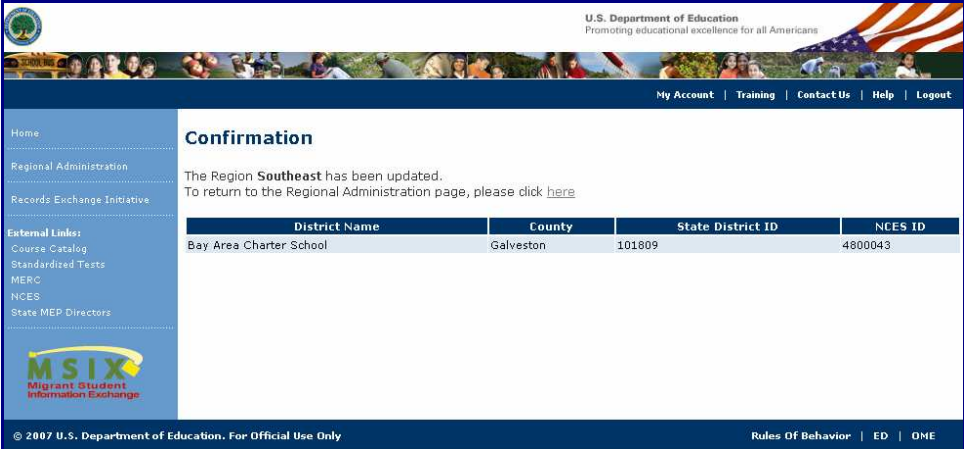
View the Confirmation

On the "Confirmation" page, the created region is displayed.

Disabling a Region

Steps to Disable a Region

1 Click the **Regional Administration** link on the Left-side Navigation menu, which will take you to the "Regional Structure Administration" page.

2 On the "Regional Structure Administration" page, select the **Edit** link next to the region that needs to be updated.

3 Select the **Disable Region** option in the Region Information section.

4 Once the Region update is completed, click the **Update Region** button.

5 Click the **Yes** button on the "Confirmation" page.

Access Regional Structure Administration

After the regions and districts have been updated in the regional structure, the page then displays all the regions and districts that have been added. The page becomes the regional structure landing page where you can update the regional structure options, link to the edit region page, enable regions, add new regions, and print each section.

Disable the Region

The region and district can be updated on this page. Click "Disabled" to disable the region.

Confirm of Your Action

Verify the information on the "Confirmation" page and click **Yes.**

Review Confirmation of Your Action
Review the results of your action on the "Confirmation" page.

Accessing the State Region Consolidated View

Steps to View the Region Consolidated View

1 Click the **Regional Administration** link on the Left-side Navigation.

Access the State Region Consolidated View
This view can only be accessed by the Government Administrator role.

Section 7: User Administration

State User Administrators, Regional User Administrators, and OME User Administrators establish and maintain Migrant Student Information Exchange (MSIX) user accounts. The *MSIX User Administrator Guide for Managing User Accounts* provides further detail regarding tasks for this role and is available in Trainers' Corner on the MSIX website. This guide outlines the process that MSIX User Administrators must follow when administering accounts for authorized MSIX users. It also lays out policies, procedures, and guidelines for accessing MSIX to help User Administrators understand the User Management Lifecycle as it pertains to MSIX.

This section includes the following topics:

- Establishing User Accounts
- Updating User Accounts
- Resetting Passwords
- Disabling or Deactivating User Accounts

Establishing User Accounts

Establishing user accounts is the process that User Administrators follow to add users giving them access to MSIX. The Administrator must confirm that a user has completed an application for accessing MSIX. Further, they must confirm that the applicant's identity and their user role have been confirmed by a Verifying Authority, which can be the applicant's direct supervisor or an individual that is above the direct supervisor in an official reporting structure. For example, an applicant who is a teacher should submit the application to his/her principal for identity verification review, or an applicant who is a state MEP Administrator should submit to his/her MEP Director for identity verification. **Note**, the Help Desk does not reset passwords, create new users, deactivate, or disable existing users. These tasks belong to User Administrators.

User Administration Error Messages

MSIX displays an error message when validation rules have been violated. You are given the option to reenter input values and resubmit your request. Your request is not processed until all validation rules have been satisfied. Below are some examples of User Administration Search error messages:

User Administration Error Messages	
Scenario	**Error Message**
The Fields are Blank on the Page	**Error:** Please enter at least one search criteria.
Either the First or Last Name Field is Blank	**Error:** Please enter at least one character for the first and last name.
One or More of the Required Fields is Blank	**Error:** Please enter the required fields marked with an asterisk.

Steps to Create User Account

1 Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.

2 Click the **Create New User** link in the main body section of the "User Administration" page.

3 On the "Create New User" page, enter <u>at a minimum</u> all required information to create a new user, including the **First Name**, **Last Name**, **Work Telephone Number**, **Work Email Address**, and **User Role**. Complete the other fields if you have the information available.

4 Click the **Next** button.

5 Click **Save.**

Access the "User Administration" Page

The User Administration page is the gateway that provides the User Administrator access to create a new user account.

Enter New User Information

The "Create or Update MSIX User" page is used to create a user account.

Confirm Your Action Before Saving

Determine that you have added all of the information accurately before you **Save** your action. If a change is needed, click the **Back** button to return to the previous page and revise the information.

Review Confirmation of Your Action

On the "Confirmation" page, MSIX confirms the action you just took.

Review New User Account Notification

Two email notifications are sent to the user when their new MSIX account has been created. One email provides the User Name and the other email provides the initial Password that must be changed with the initial log in. These email will be similar to the sample shown in the "Logging In" section of this manual.

Updating User Accounts

Updating a user account is the process that the User Administrators follow to make changes to a user account in MSIX.

Steps to Update a User Account

1 Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.

2 Enter **First Name**, **Last Name**, or **User Name** into the text fields.

3 Click the **Search** button.

4 Search results can be **sorted by column names** by clicking the column name.

5 Click on a **User** link to select a user from the list of Search Results.

6 **Update** the necessary user information on the "Create or Update MSIX User" page.

7 Click the **Next** button.

8 Click **Save** on the "Confirmation" page.

Access the "User Administration" Page

The "User Administration" page is the gateway that provides the Administrator access to modify an existing user account.

Select the User Account to Update

On the "User Administration" page, identify the user account that needs revision.

Update MSIX User
Make the necessary changes to the account.

Confirm Your Action

Review your changes before you save your action.

Review the Confirmation of Your Action

The "Confirmation" page displays a message that your request has been updated.

Resetting Passwords

The Reset Password feature allows User Administrators to reset a user's password when the user cannot do it. A user can request that their password is reset in the My Account feature. This may occur if for some reason they want a different password. However, a User Administrator needs to reset a user's password in two situations: (1) the user is locked out of their account because they tried three times to access it, but failed on all three attempts, (2) the user forgot their password, or (3) if 90 days have gone since the user last used their Password and it expired. *Note*, the Help Desk does not reset passwords, create

new users, deactivate, or disable existing users. These tasks belong to User Administrators.

Steps to Reset a Password

1 Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.

2 Enter **First Name**, **Last Name**, or **User Name** into the text fields.

3 Click the **Search** button.

4 Click on a **User** link to select a user from the list of Search Results.

5 Check the **Password Reset** checkbox.

6 Click the **Next** button.

7 Click **Save** on the "Confirmation" page. MSIX generates an email notification to the user containing the new password information. This email will be similar to the sample shown in the "Logging In" section of this manual.

Access the "User Administration" Page
The "User Administration" page that provides the Administrator access to reset an existing user's Password.

Select the User Account to Reset

On the "User Administration" page, identify the user account that needs to be reset.

Reset the Password

Check the box to **Reset Password.** Then, click the **Next** button.

Confirm Your Action

Review your changes before your save your action.

Review the Confirmation of Your Action

MSIX generates an email notification to the user containing the new
password information.

Disabling or Deactivating User Accounts

Disabling a user account is the process that prevents the user from accessing
MSIX. This a <u>temporary</u> change for situations where the user will not need to
use MSIX for a period of time. For example, someone may be out on a personal
leave of absence and not need to use MSIX during that time. Once the user has

returned to work the account can be enabled and they can go back to fulltime use.

Disabling is different from deactivating an account in which case the account is **permanently closed**. MSIX retains record that an account existed, but the account may not be reopened. If an account has been deactivated and the user returns to use MSIX again, a new account must be opened. ***Note***, the Help Desk <u>does not</u> reset passwords, create new users, <u>deactivate, or disable</u> existing users.

Steps to Disable or Deactivate a User Account

1 Click the **User Administration** link on the Left-side Navigation, which will take you the "User Administration" page.

2 Enter **First Name**, **Last Name**, or **User Name** into the text fields.

3 Click the **Search** button.

4 Click on a **User** link to select a user from the list of Search Results.

5 To disable an account, select **Disabled** next to Account Status.

6 Click the **Next** button.
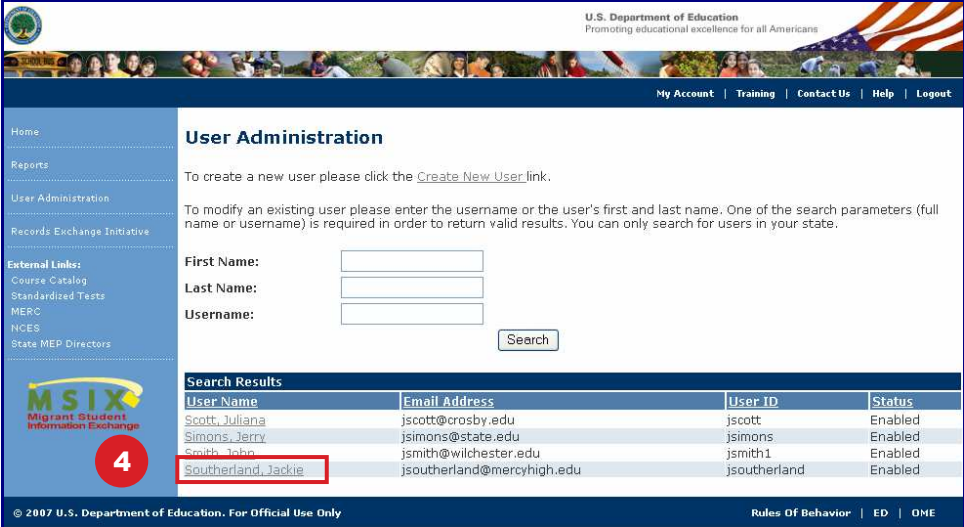
7 Click **Save** on the "Confirmation" page.

Access the "User Administration" Page
The "User Administration" page that provides the Administrator access to disable or deactivate an existing user's account.

Select the User Account to Disable or Deactivate

On the "User Administration" page, identify the user account that needs to be disabled or deactivated.

Disable or Deactivate the Account

Check the **Disabled** box to disable or the **Deactivate Account** box to deactivate. Then, click the **Next** button.

Confirm Your Action

Review your changes before your save your action.

Review the Confirmation of Your Action

MSIX confirms the task you just completed.

Appendix A: Acronyms

Acronyms	Description
ED	U.S. Department of Education
EDEN	Education Data Exchange Network
DOB	Date of Birth
FAQ	Frequently Asked Questions
HTML	HyperText Markup Language
MEP	Migrant Education Program
MERC	Migrant Education Resource Center
MS	Microsoft
MSIX	Migrant Student Information Exchange
NCES	National Center for Education Statistics
OME	Office of Migrant Education
PDF	Portable Document Format
ROB	Rules of Behavior

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